mstore V3

User Manual

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1 Document Searching Guide

1.1 What's in this Chapter

mstore will store your documents on the computer so that you can quickly search for them.

Within mstore you can,

- Search references to match criteria
- Further refine searches with advanced search

This chapter will explain,

- How **mstore** Works
- Starting **mstore**
- Searching for documents
- Advanced searching
    - Document Reference Search
    - Common Reference Search
- Full Text Searching
    - Performing a Full Text Search
- Cross Cabinet Searching

1.2 How mstore Works

Figure 1

Figure 1 shows how you can use any device to input paper documents into mstore. Multiple computers can then access mstore to store and retrieve documents in electronic form. In Figure 2 you can see that by using the external application 'mstore Traylink', you can store almost any electronic file in mstore.

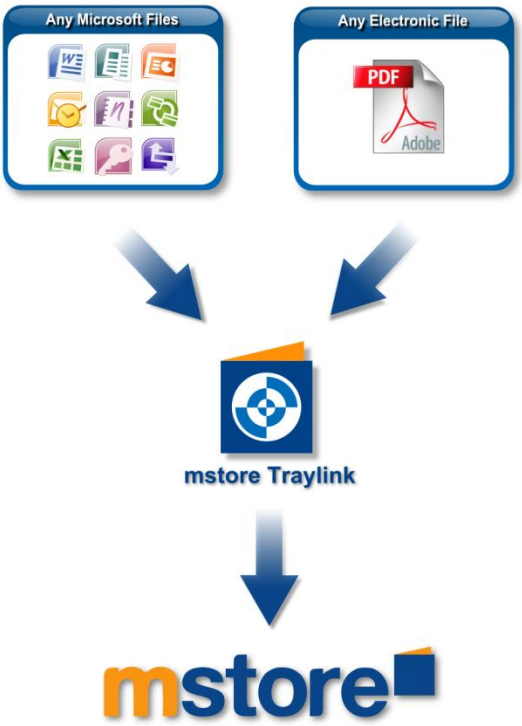


Figure 2

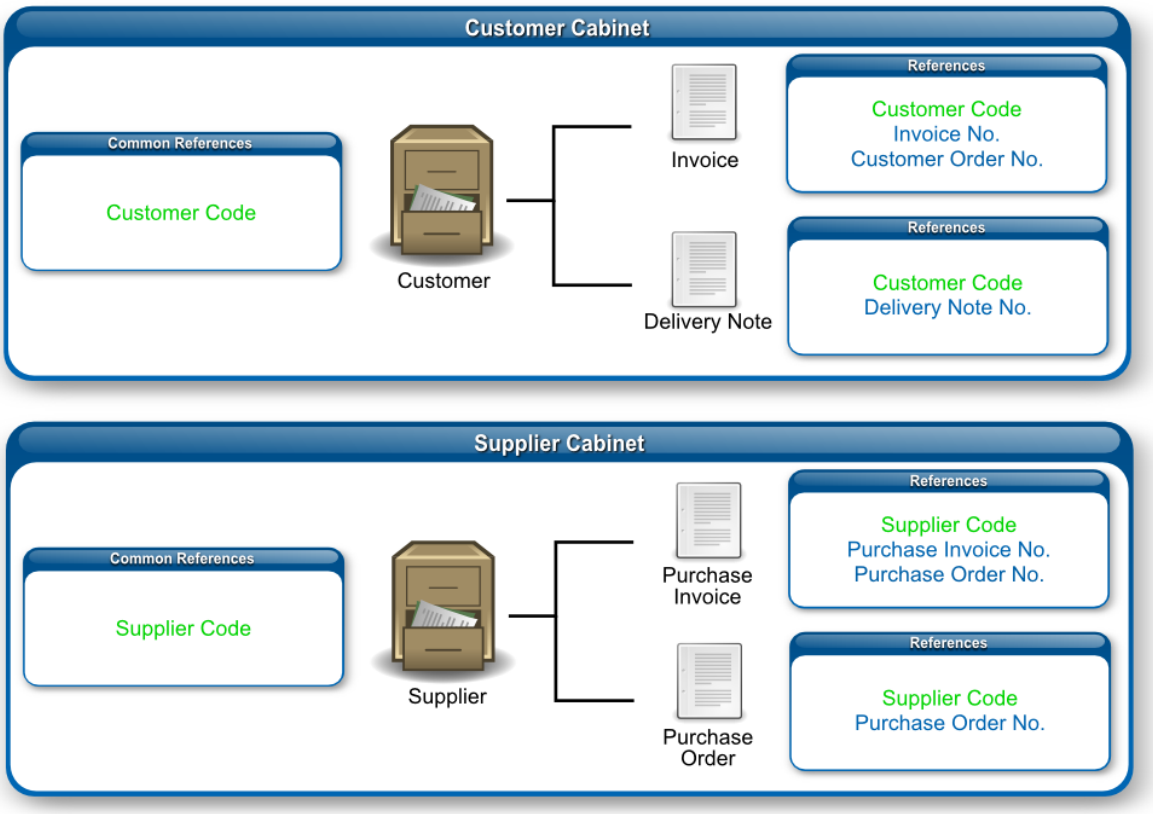


Figure 3

An mstore **Document Type** groups documents by the function they perform. Document types may be specific e.g. **Invoices** or **Application Forms**, but may also be more general, such as **Correspondence**. Document types are grouped into mstore **Cabinets**, in the same way that physical files may be grouped.

As in a physical filing system, mstore **References** help you find what you have stored. This is analogous to the label or labels on a folder in a physical system. mstore **Common References** apply to all document types within that mstore **Cabinet** – in Figure 3, all documents in the Customer Cabinet are filed by Customer, and all in the Supplier Cabinet by Supplier.

To further aid the speedy retrieval of documents, mstore also uses **Document References**, which can be set up differently for each document type. In the illustration, Invoices may be stored and retrieved not only by Customer, but also by Invoice Number or Customer Order number - or any combination of the 3.

1.3 Starting mstore

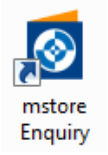


Figure 4

Double click the mstore icon on the desktop (Figure 4) and mstore will begin to load (Figure 5). The program may also be available from your Start Menu depending on how your workstation has been configured by your administrator.

mstore
Copyright © 1998-2012, Arena Group Ltd
The copyright in Arena software belongs to Arena Group Ltd
and can only be used under relevant licence terms.
Loading. Please wait...

Figure 5

Login if necessary with your username and password (This should be provided by your system administrator) (Figure 6).

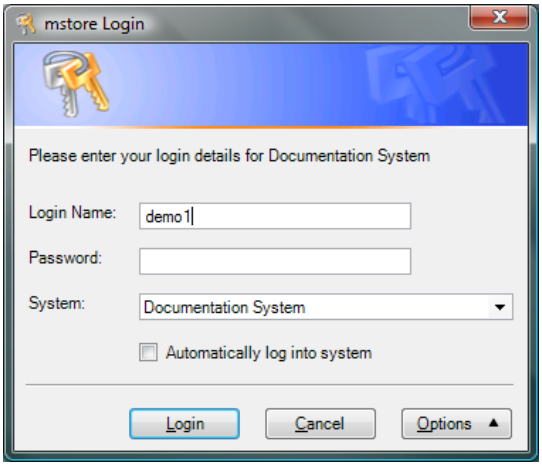


Figure 6

1.4 Searching for documents

Click on 'All Cabinets Search' in the Listbar to see Figure 7.

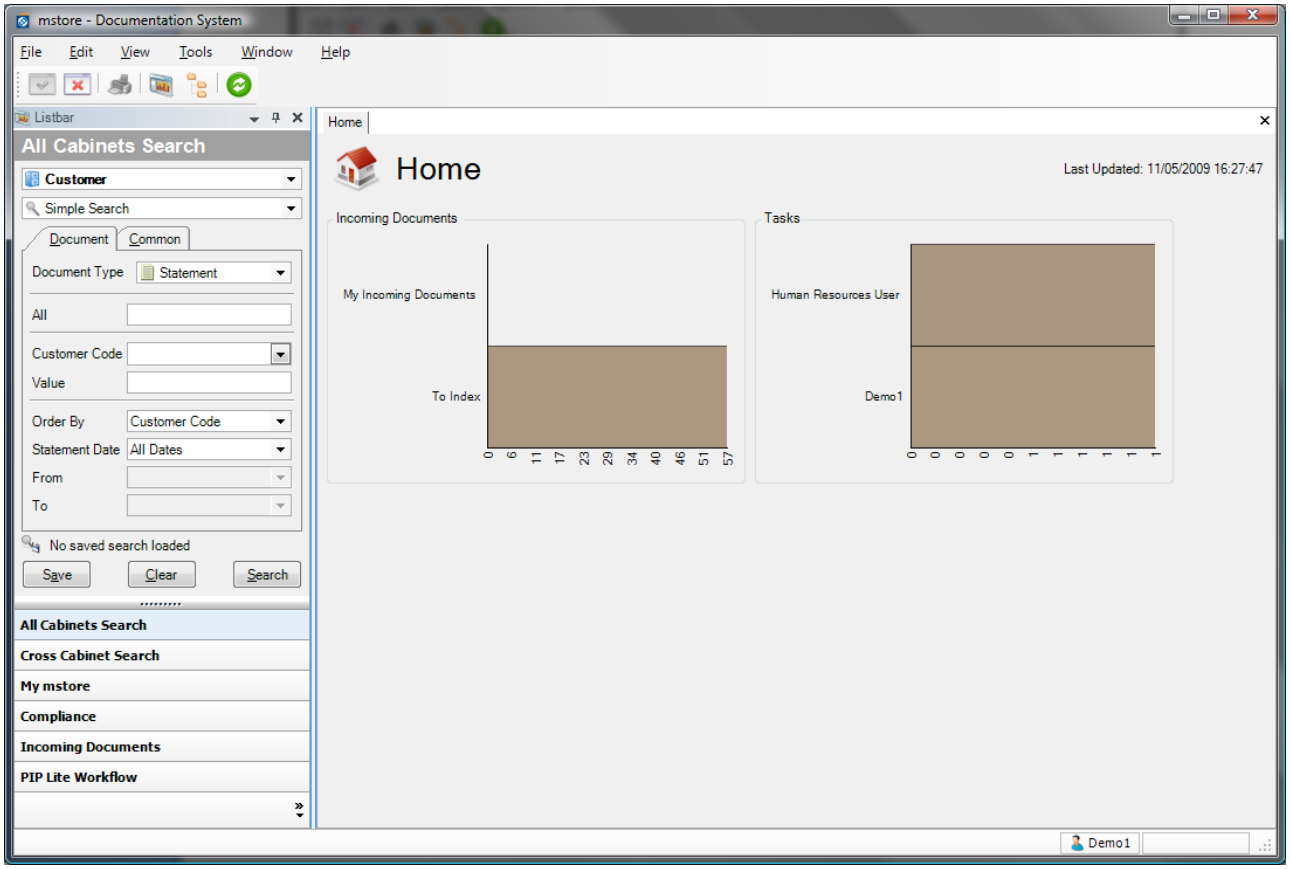


Figure 7

Pick either a **Document** (Figure 8) or **Common** (Figure 9) search and then enter your criteria into the boxes (or into **All** to search against all of the references).

To enter the criteria first select the cabinet which you want to search. Then either fill in the '**All'** field or the common references (and document references for a **Document** search).

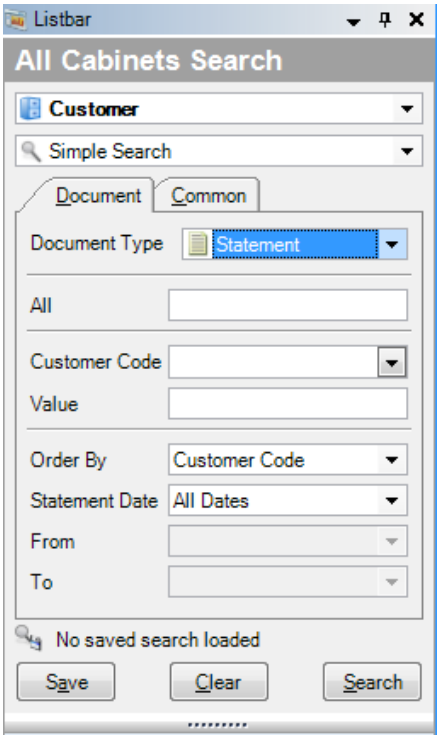


Figure 8

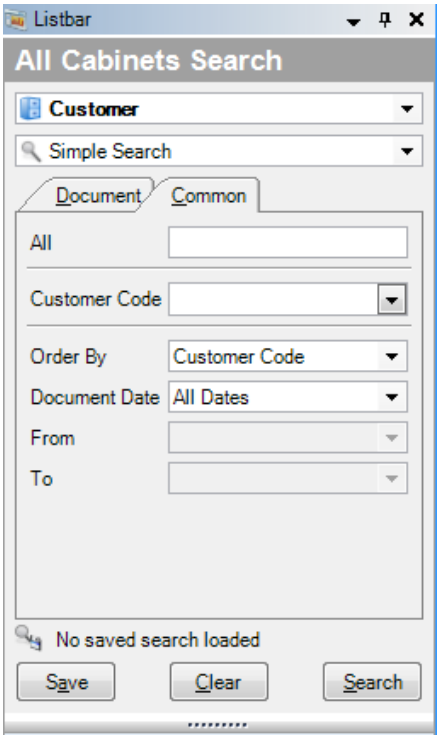


Figure 9

Hitting search will then list all the documents corresponding to your search in a new tab, filling the main area of the screen. This allows the documents to be previewed. Use the arrow keys to move through the list (up / down) or through the pages of scanned documents (left / right).

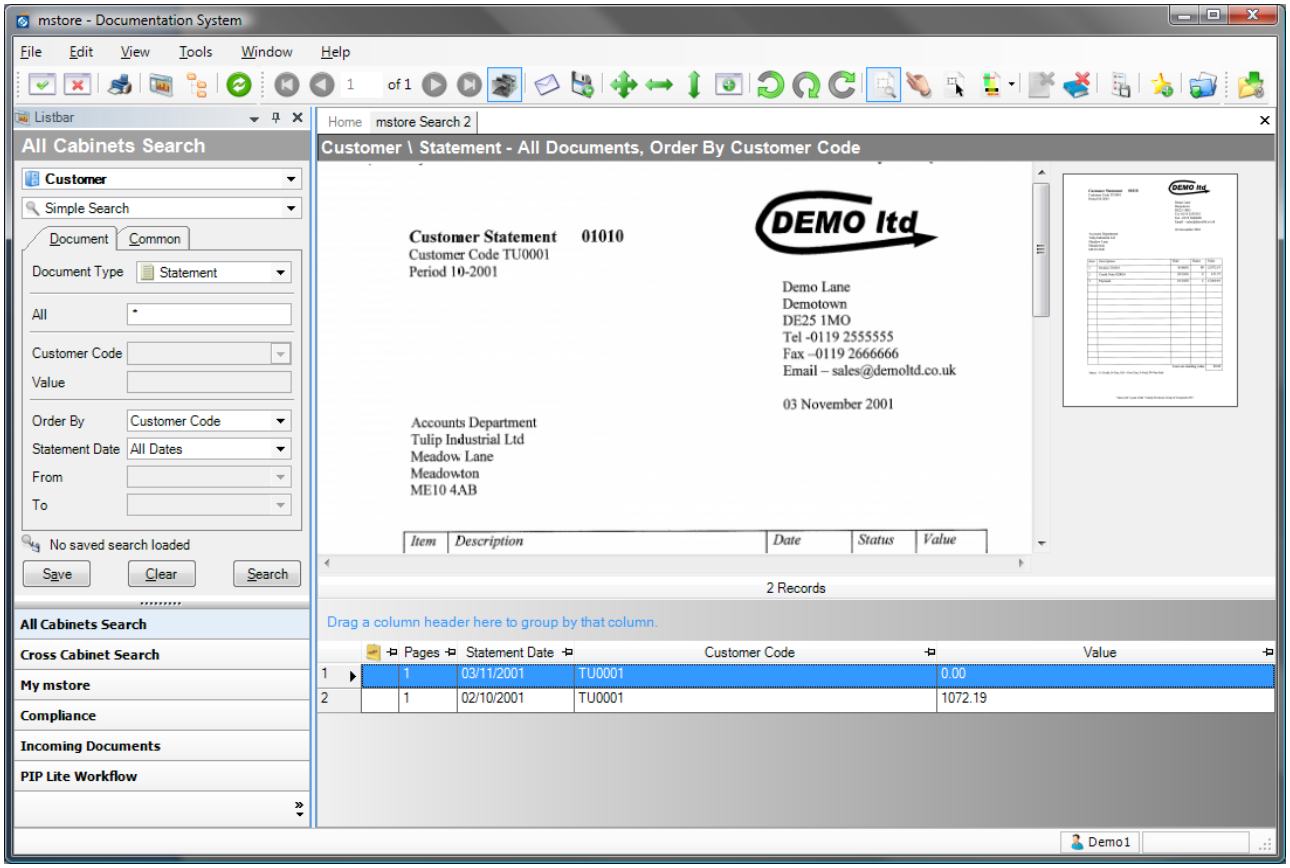


Figure 10

On the right hand side you can use the thumbnails to change page by clicking on the preview of the page you want to view.

Click on an item in the list to preview the document and use the toolbar to perform operations on the document such as rotating, zooming in and out, etc.

Figure 11

Click on the buttons in Figure 11 to **Email** or **Export** the document, if you want to **Print** the document click **File → Print** or use the print tool on the toolbar.

1.5 Advanced searching

The **Advanced Search** allows you to be more specific about how you search for documents, allowing you to specify the operator used for every reference and allowing you to enter multiple criteria for the same field.

1.5.1 Document Reference Search

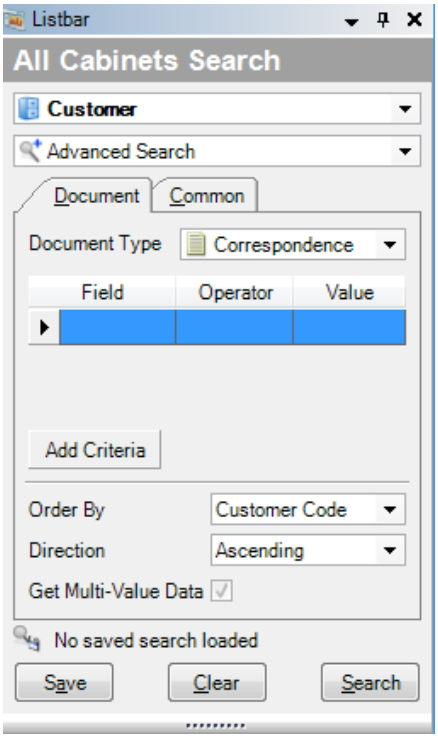


Figure 12

Advanced searching by Document type (Figure 12) works in the same way as a simple search but the way you enter reference criteria is more complex, and therefore more powerful.

To enter criteria click on an empty field to drop down a list of available references (Figure 13) then click on the operator field to select the type of match you want to make (Figure 14) and enter a value. To add more criteria click the add criteria button, if you want to remove criteria click and select the rows to be removed and press the delete key.

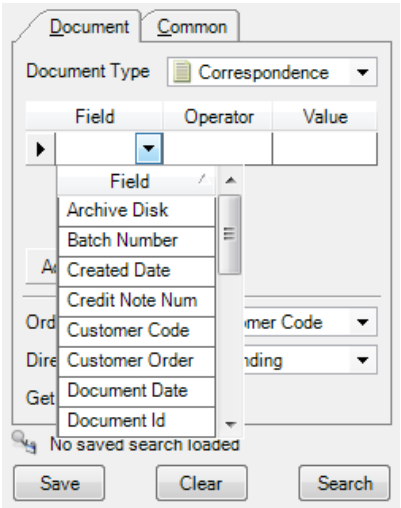


Figure 13

In advanced search you will be able to search on any common references (and document references in the document tab) as well as display references and special fields stored by mstore, these include…

- Archive Disk
- Batch No
- Created Date
- Document ID
- File Type
- Pages
- Priority

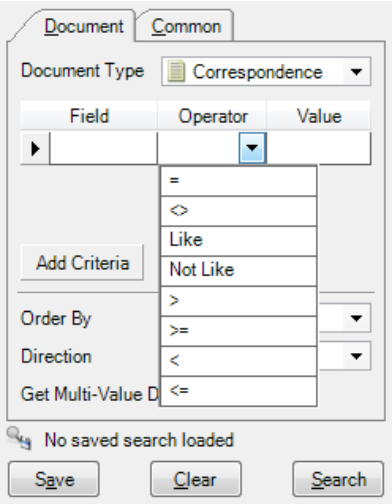


Figure 14

Figure 15 shows the criteria to search for all the customer quotes that have been scanned in (TIF files) for customers whose names begin with A or B for the year 2007.

This is because the record must match all of the criteria, but the advanced search is smart enough to detect when there should be exceptions to this.

The Fields are grouped together when being analyzed, within each groups the operators are either joined together with **OR**'s or **AND**'s depending on the operator. This means the search in Figure 15 is

(Customer No **Like** A* **OR** Customer No **Like** B*)
AND
(File Type **=** TIF)
AND
(Document Date **>=** 01/01/2007 **AND** Document Date **<** 01/01/2008)

The different fields are joined by an **AND**.

With the same fields the Customer No uses an **OR** because Customer No **Like** B* uses the **Like** operator. Similarly the Document Date uses an **AND** because Document Date **<** 01/01/2008 uses the **<** operator.

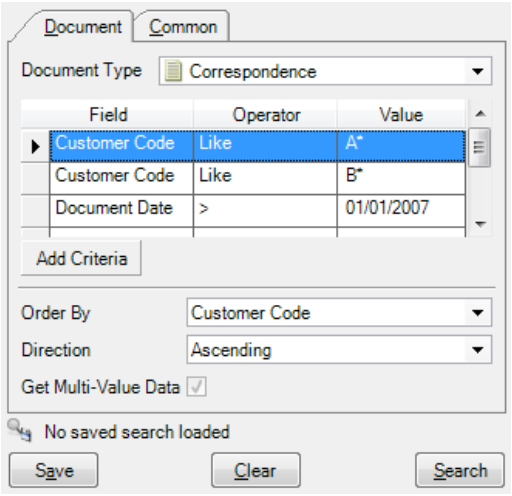


Figure 15

Because of the way an advanced search works it is important that you order your criteria correctly.

For Example:

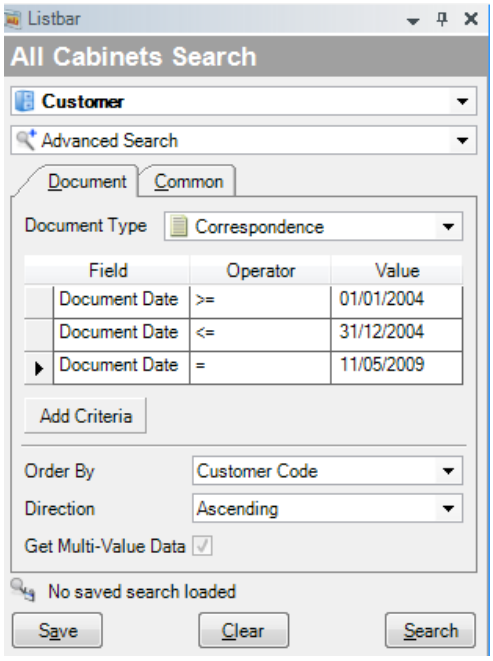


Figure 16

Figure 16 shows a query which will return all documents created during the year of 2004, or on the specific date of '11/05/2009'. When this search is executed it will return the results given in Figure 17.

		Pages	Document Date	Custo	Quote	Customer Orde	Invoice N	Credit Note	From	To	Subject
1		1	30/03/2004	DA0001					Keith Whit	Keith Whit	Fax From:
2		1	30/03/2004	DA0001					Keith Whit	Keith Whit	Order inpu
3		1	30/03/2004	DA0001					Keith Whit	Keith Whit	Fax From:
4		3	21/05/2004	DA0001							

Figure 17

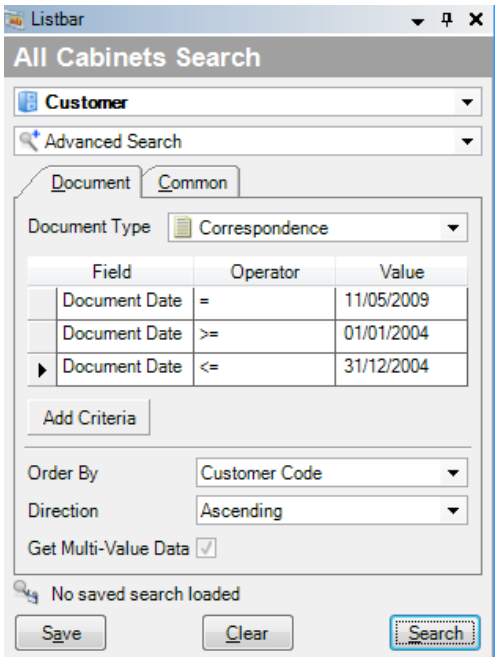


Figure 18

Figure 18 shows a query which will return no records because the criteria specifies no days (Figure 19).

This is because it is looking for documents created on the '11/05/2009' **AND** during the year of 2004, which is obviously impossible. For this reason when the search above is executed, mstore responds with the message in Figure 19.

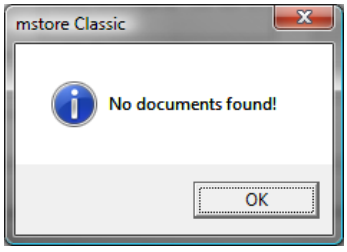


Figure 19

1.5.2 Common Reference Search

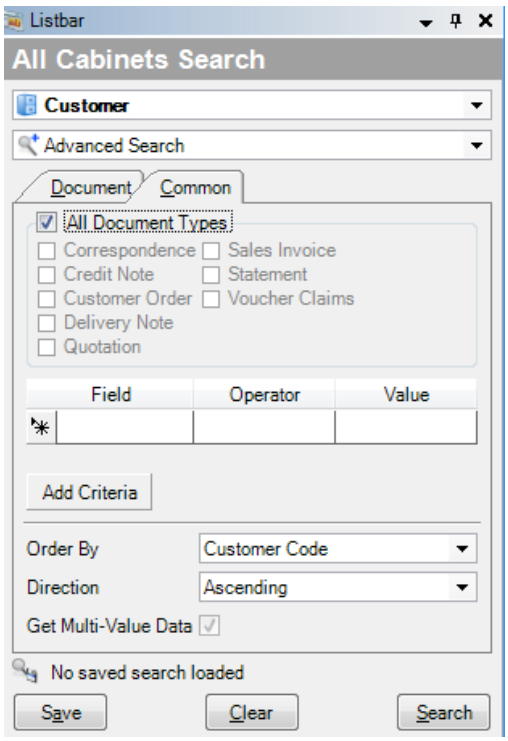


Figure 20

When using a common reference advanced search (Figure 20) you can select either all of the document types, or manually select as many document types as you want to search on.

1.6 Full Text Searching

Another method of searching for documents in mstore is the Full Text search. When this feature is enabled you are not only able to search for common and document references, but subject to the type of document, you can also search within the text on the document itself.

When the necessary components for full text searching are installed, a third tab will appear within the document search dialog alongside ‘Document’ and ‘Common’. Clicking on the tab will display the full text search dialog shown in Figure 21. Due to the fact that searches are cumulative (i.e. you can enter data in the document tab and also on the full text tab), if any criteria has been entered on either of the other two tabs, their caption will turn red to notify you of this.

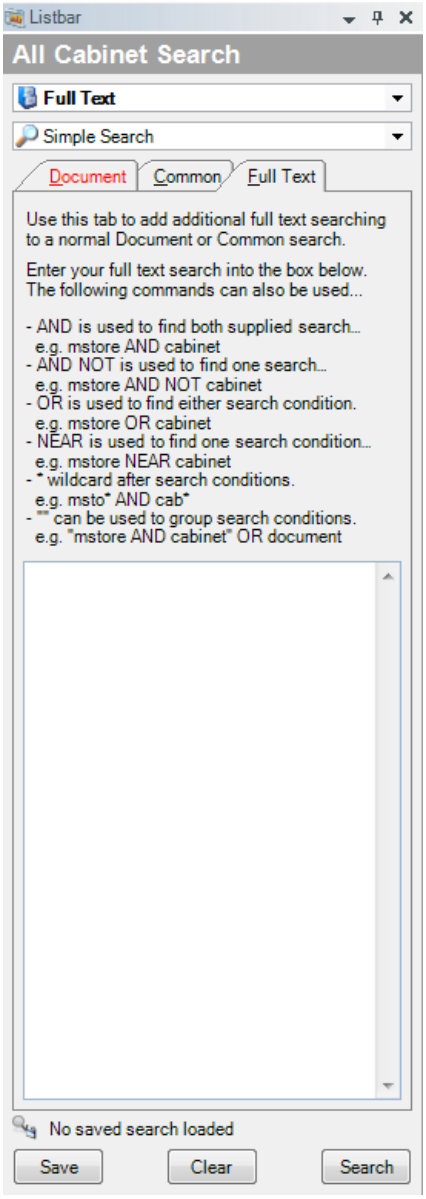

Listbar
All Cabinet Search
Full Text
Simple Search
Document
Common
Full Text
Use this tab to add additional full text searching to a normal Document or Common search.
Enter your full text search into the box below. The following commands can also be used...
- AND is used to find both supplied search... e.g. mstore AND cabinet
- AND NOT is used to find one search... e.g. mstore AND NOT cabinet
- OR is used to find either search condition. e.g. mstore OR cabinet
- NEAR is used to find one search condition... e.g. mstore NEAR cabinet
- * wildcard after search conditions. e.g. msto* AND cab*
- "" can be used to group search conditions. e.g. "mstore AND cabinet" OR document
No saved search loaded
Save
Clear
Search

Figure 21

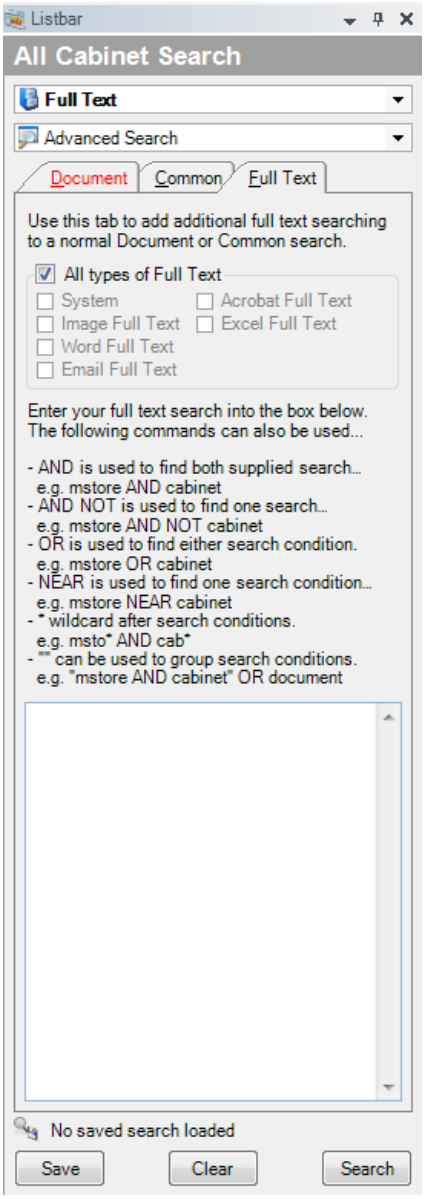

Listbar
All Cabinet Search
Full Text
Advanced Search
Document
Common
Full Text
Use this tab to add additional full text searching to a normal Document or Common search.
All types of Full Text
System
Acrobat Full Text
Image Full Text
Excel Full Text
Word Full Text
Email Full Text
Enter your full text search into the box below. The following commands can also be used...
- AND is used to find both supplied search... e.g. mstore AND cabinet
- AND NOT is used to find one search... e.g. mstore AND NOT cabinet
- OR is used to find either search condition. e.g. mstore OR cabinet
- NEAR is used to find one search condition... e.g. mstore NEAR cabinet
- * wildcard after search conditions. e.g. msto* AND cab*
- "" can be used to group search conditions. e.g. "mstore AND cabinet" OR document
No saved search loaded
Save
Clear
Search

Figure 22

Figure 21 shows the full text search dialog in 'Simple' mode where the user is able to perform basic searches for specific words, phrases, and wildcards within the documents. The red colour of the 'Document' tab shows that criteria is present on this tab. Figure 22 shows the same dialog in 'Advanced' mode where the user is also able to pick the type of document they wish to search on (e.g. Acrobat files only).

1.6.1 Performing a Full Text Search

Doing a full text search may involve simple one-word searches, or it may involve several groups of search criteria executed at the same time. This allows you to narrow down the number of matching documents that meet your criteria. The criteria strings are entered into the white box. mstore provides you with some basic examples of searches on the tab itself, and some further examples are shown below.

```
Test1 AND Test2 AND Test3
```

In order to meet this criterion, a document must have all three of the words present.

Test1 OR Test2 OR Test3
This condition will match any documents that feature any of the three words. If the document contains two or more of the words, it is still considered to be a match.

Test1 OR Test2 AND NOT Test3
If a document contains the first two words but not the third, it will be returned as a match. If the third word is found then document will be rejected, even if it contains either or both of the first two words.

Test OR *Document*
This wildcard search criteria will match any document that contains a string which begins with “Test” or ends with “Document”.

(Test1 AND Test2) OR Test3
The condition(s) in brackets are always evaluated first and are a match in their own right. This means that this criterion will match any document that contains both the strings “Test1” and “Test2”, the string “Test3”, or all three.

When a match is made mstore will display the following information at the bottom of the screen containing a list of the documents that have been matched against the supplied criteria.

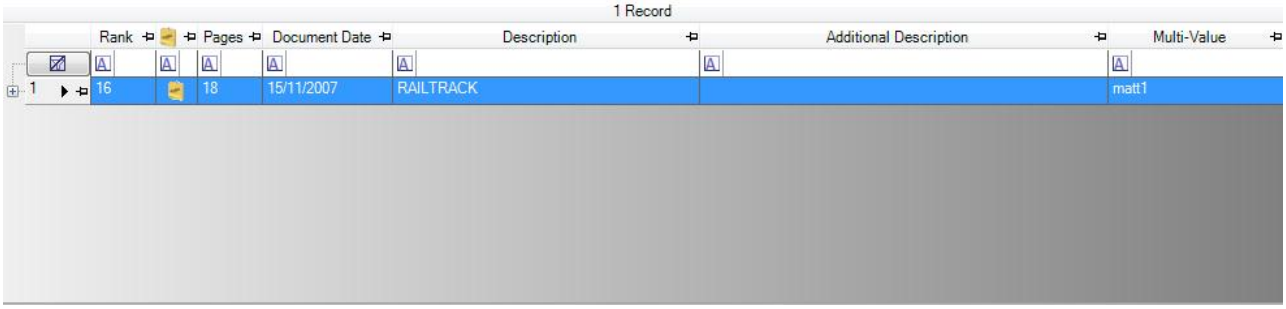


Figure 23

If you click on a row within the grid of matching documents, the associated document will be displayed in the mstore viewer. However if the matching document is double-clicked in the grid, the document will be opened in mstore and you will be taken to the ‘Full Text’ tab within the mstore viewer (shown in Figure 24).

There may be occasions when you view the full text tab and the collection of full text isn’t yet complete. In this case the page row of the grid will be in italics with a status message of “Not yet processed”.

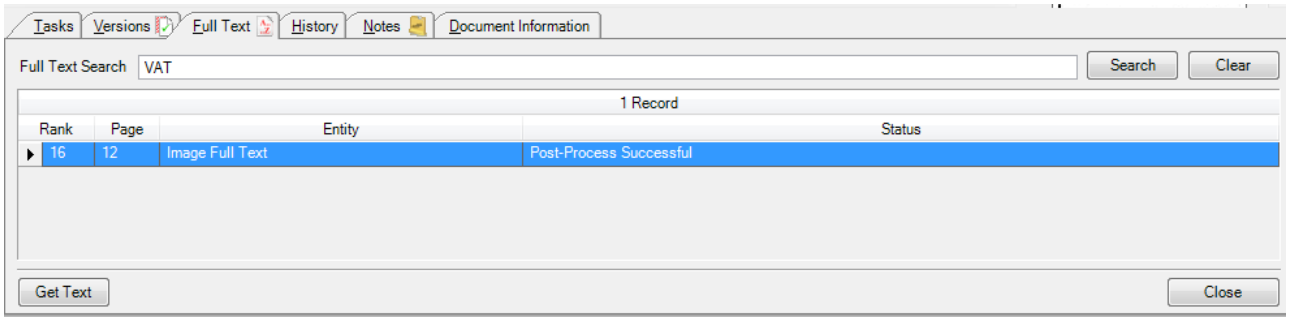


Figure 24

When the full text information about the job is displayed as in Figure 24, the document will also display the page on which the supplied criterion has been found. If the criteria matched more than one page, a list of the matching pages will be displayed. Clicking on each page will update the view of the document, taking you to that particular page. The 'Get Text' button will display a dialog showing the full text information held for that particular page (see below).

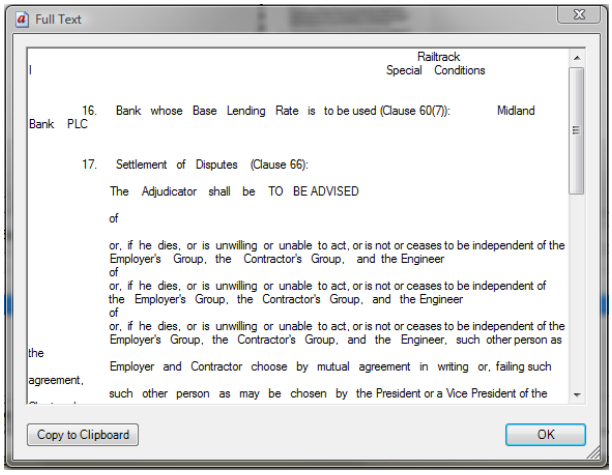

Full Text
Railtrack
Special Conditions
16. Bank whose Base Lending Rate is to be used (Clause 60(7)): Midland Bank PLC
17. Settlement of Disputes (Clause 66):
The Adjudicator shall be TO BE ADVISED
of
or, if he dies, or is unwilling or unable to act, or is not or ceases to be independent of the Employer's Group, the Contractor's Group, and the Engineer
of
or, if he dies, or is unwilling or unable to act, or is not or ceases to be independent of the Employer's Group, the Contractor's Group, and the Engineer
of
or, if he dies, or is unwilling or unable to act, or is not or ceases to be independent of the Employer's Group, the Contractor's Group, and the Engineer, such other person as the Employer and Contractor choose by mutual agreement in writing or, failing such agreement, such other person as may be chosen by the President or a Vice President of the
Copy to Clipboard
OK

Figure 25

With the full text tab, you can also perform further full text searches within the current document using the box at the top of the screen. Clicking the 'Clear' button will remove all existing criteria from the search, and the grid below will be populated with all the pages from the matched document (Figure 26).

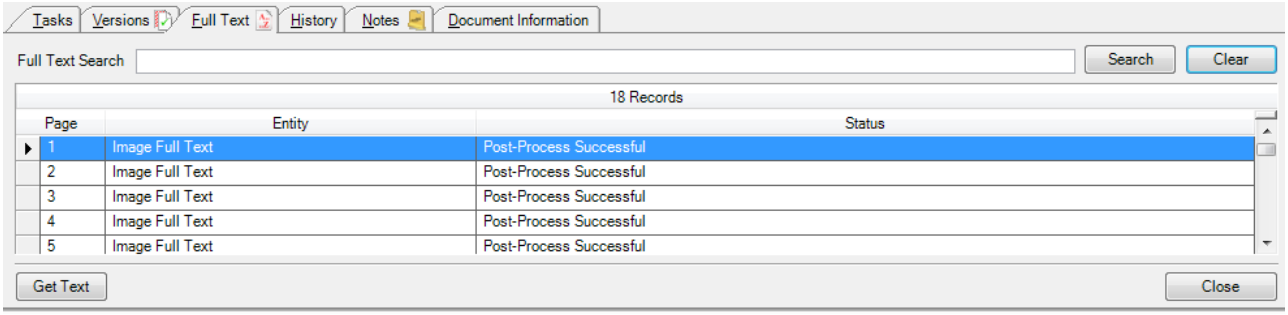


Figure 26

Once you have cleared the existing contents of the search box, you can enter your new criteria to match other pages within the current document. The search criteria may contain wildcard and conditional search options as with the original search from the search dialog.

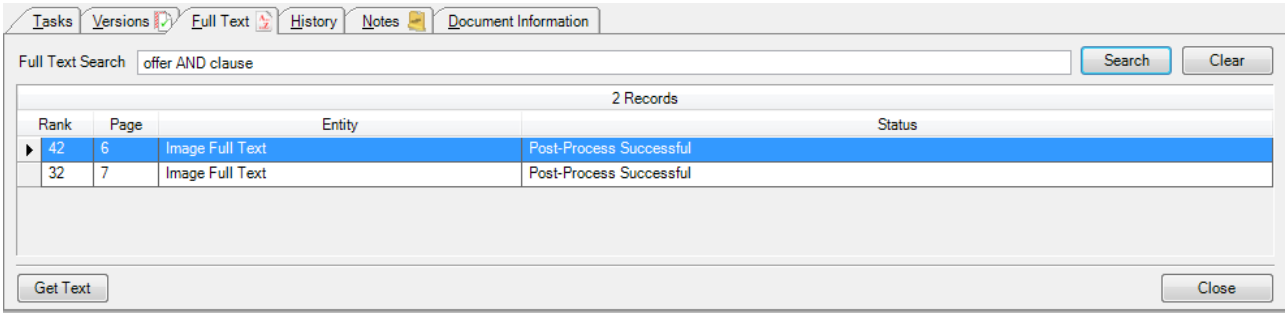


Figure 27

1.6.2 Performing a Full Text Search Along With Reference Criteria

Whilst it is perfectly acceptable to perform a search with a combination of reference criteria and full text criteria, you need to be aware of how mstore interprets this information to perform a search and what documents it will match and present in the results.

When searching using a combination of references and full text, mstore will only match documents which have the reference criteria in one of their references AND an occurrence of the full text criteria in the extracted full text information. A typical example might be a search for documents with customer ID ‘ABC123’ and an occurrence of the word ‘invoice’ in their full text.

If you configure and run this search in mstore you will only receive a list of documents which match BOTH criterion and not just one or the other. This means that if you have 5 documents that match the reference value ‘ABC123’ but none of these have the word ‘invoice’ in the full text, they will not be included in the search results and you will receive ‘No Documents Found’ as a result. This is why it is important to only include both criteria types when you are wanting to specifically search for those terms. Accidentally leaving full text criteria in place may lead to confusion when interpreting the returned list of documents.

1.7 Cross Cabinet Searching

This feature of mstore allows you to search for a specific document across all the cabinets in your mstore system. This is useful when you aren't sure which cabinet or document type a specific document might be located in.

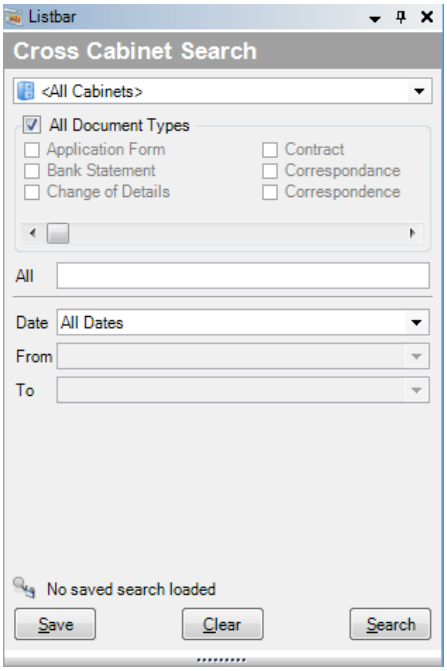


Figure 28

If you are not a system administrator, cross cabinet searching should be configured as a button on your Listbar (Figure 28). Administrators and those with the appropriate security permissions can access the cross cabinet search from the TreeView.

By default the cross cabinet search will perform a completely open search across all cabinets and document types. This is good for general find operations but there may be times when more specific cross cabinet searches are required. In this case your administrator or a user with administrative privileges can create customised cross cabinet search configurations. These configurations allow for the creation of tailored searches across multiple cabinets and document types. An example might be a 'Supplier' cross cabinet search which will be configured to search a 'Purchase Order' cabinet, an 'Invoice' cabinet, and an 'Order Acknowledgement' cabinet, whilst ignoring any others present on the system.

2 Viewing Documents and Actions

2.1 What's in this chapter

mstore stores documents via indexing so that they can be quickly searched and found when needed.

It can also manage the documents in other ways including:-

- Allowing you to quickly retrieve a copy of the document from mstore
- Interaction with documents through tasks that alert the targeted user
- Automatic auditing of documents with version control and retention
- Interactive and flexible viewer with user preferences
- Document relations tying together different document types

This chapter will explain,

- Opening Documents
  - Potentially Unsafe Documents
- Using The Toolbar
  - Changing Pages
  - Thumbnails
  - Email/Export Document
  - Best Fit
  - New Window
  - Rotation
  - Zoom Area
  - Pan Document
  - Select Area
  - Annotations
  - Delete Page
  - Delete Document
  - Save Preferences
  - Favourites
  - Edit References
  - Printing Documents
- Document Tabs
  - Tasks
  - Related Documents
  - Versions
  - History
  - Notes
  - Document Information
  - Additional Data

2.2 Opening Documents

The main way of opening a document is from a search results window. To do this double click on the document and it will appear in a new tab (Figure 29).

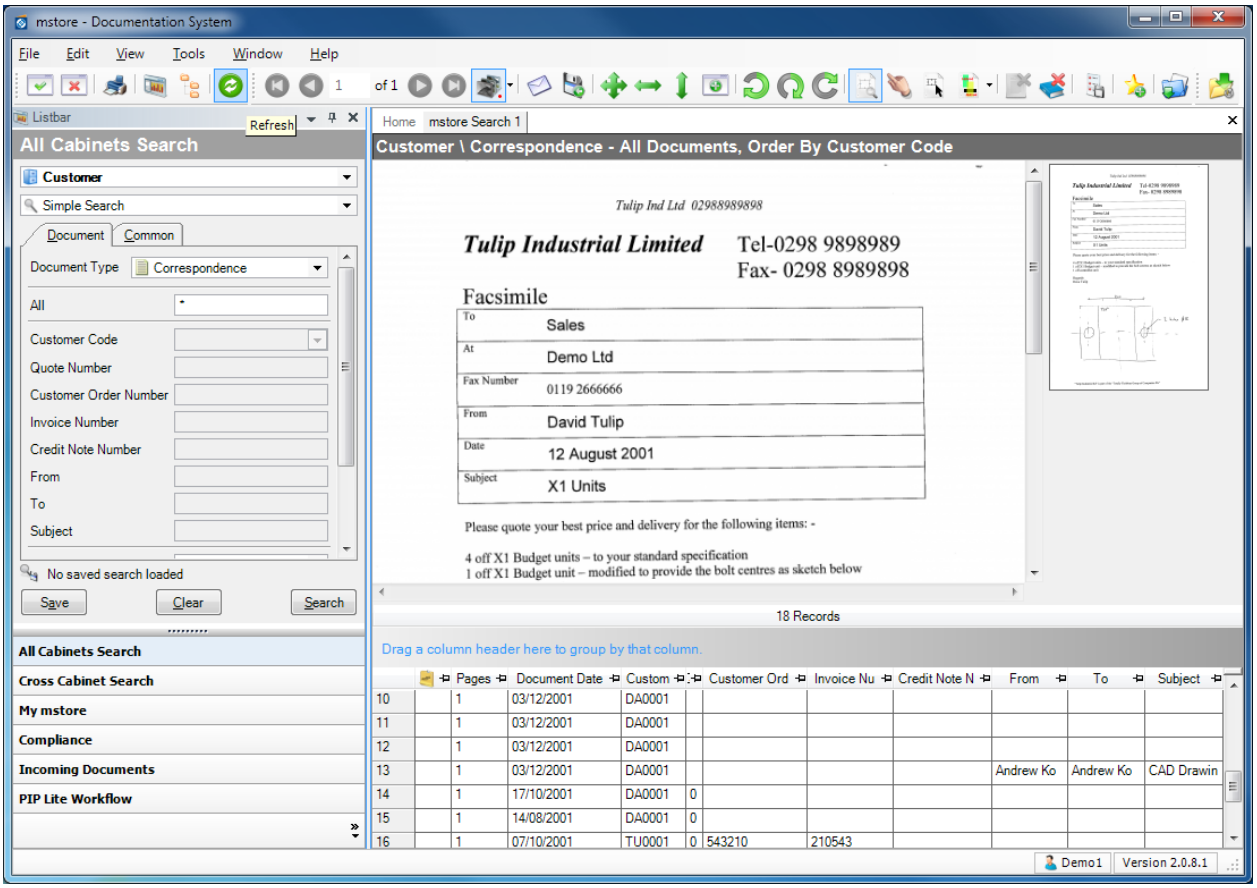


Figure 29

2.2.1 Potentially Unsafe Documents

mstore has in-built protection to prevent the indexing and viewing of documents which could potentially be unsafe. Typical file types might include…

- .TMP - Windows temporary files
- .EXE - Executable files / applications
- .BAT - DOS batch files and scripts
- .DB - Database files
- .DAT - Data files which could conceivably contain almost anything
- .LNK - Windows shortcut files
- .DLL - Dynamic link libraries and application components

This feature was implemented in mstore version 2.0.11.1. This means it is possible that on older systems which have been upgraded, potentially unsafe files may have already been indexed. If this is the case and you attempt to view such a file, mstore will respond by displaying the following message (Figure 30).

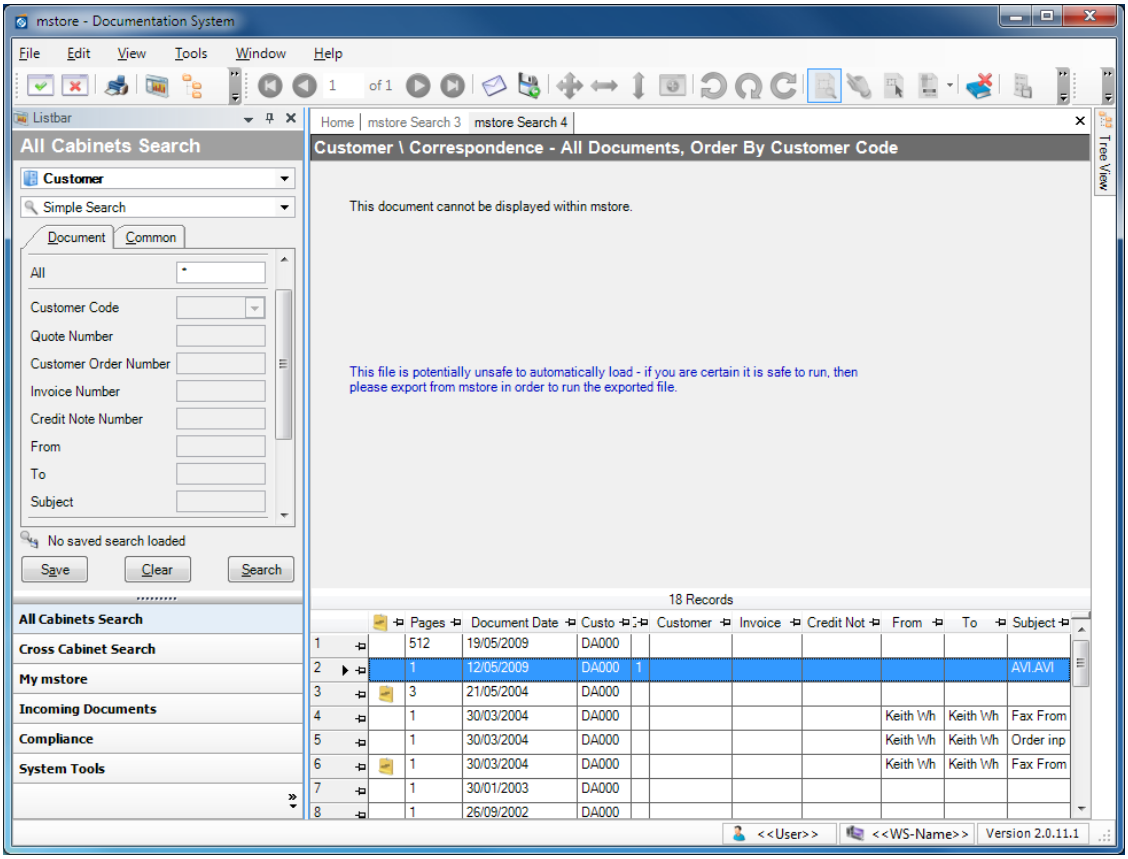

mstore - Documentation System
File Edit View Tools Window Help
Listbar
All Cabinets Search
Customer
Simple Search
Document Common
All
Customer Code
Quote Number
Customer Order Number
Invoice Number
Credit Note Number
From
To
Subject
No saved search loaded
Save Clear Search
All Cabinets Search
Cross Cabinet Search
My mstore
Incoming Documents
Compliance
System Tools
Home mstore Search 3 mstore Search 4
Customer \ Correspondence - All Documents, Order By Customer Code
This document cannot be displayed within mstore.
This file is potentially unsafe to automatically load - if you are certain it is safe to run, then please export from mstore in order to run the exported file.
18 Records
Pages Document Date Custo Customer Invoice Credit Not From To Subject
512 19/05/2009 DA000
1 12/05/2009 DA000 1 AVI.AVI
3 21/05/2004 DA000
1 30/03/2004 DA000 Keith Wh Keith Wh Fax From
1 30/03/2004 DA000 Keith Wh Keith Wh Order inp
1 30/03/2004 DA000 Keith Wh Keith Wh Fax From
1 30/01/2003 DA000
1 26/09/2002 DA000
<<User>> <<WS-Name>> Version 2.0.11.1
Tree View

Figure 30

2.3 Using The Toolbar

Figure 31

The document toolbar (Figure 31) is shown when viewing a document, using the tools on the toolbar you can manipulate the document.

2.3.1 Changing Pages

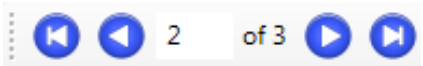


Figure 32

The buttons allow you to move between pages, jump to the first or last, you can also enter a page number and jump directly to that page by pressing enter.

2.3.2 Thumbnails

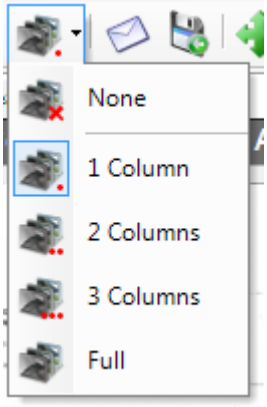


Figure 33

The thumbnails option (Figure 33) shows a preview image of each page within the document, you can then select these to change page. Thumbnails are optionally shown by turning them off or on from the toolbar icon.

The user has the ability to display 0, 1, 2 or 3 columns of thumbnails alongside the document preview, or by selecting **Full** the entire preview screen can be populated with thumbnails. The screenshot below (Figure 34) shows the thumbnail settings configured with 2 columns.

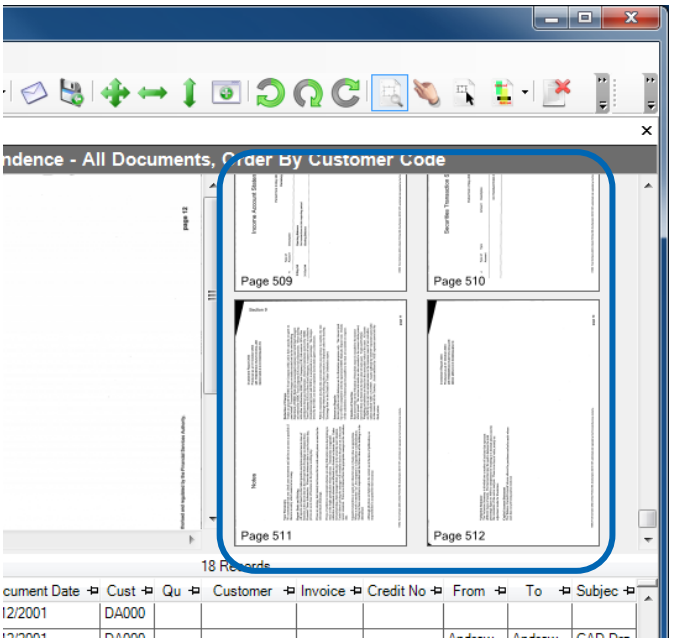


Figure 34

When mstore is loading documents with a large number of pages, the process of generating all of the thumbnail images can take a considerable length of time. Whilst thumbnails are being generated mstore will show a '…loading…' placeholder for each thumbnail that is currently visible to the user as in Figure 35.

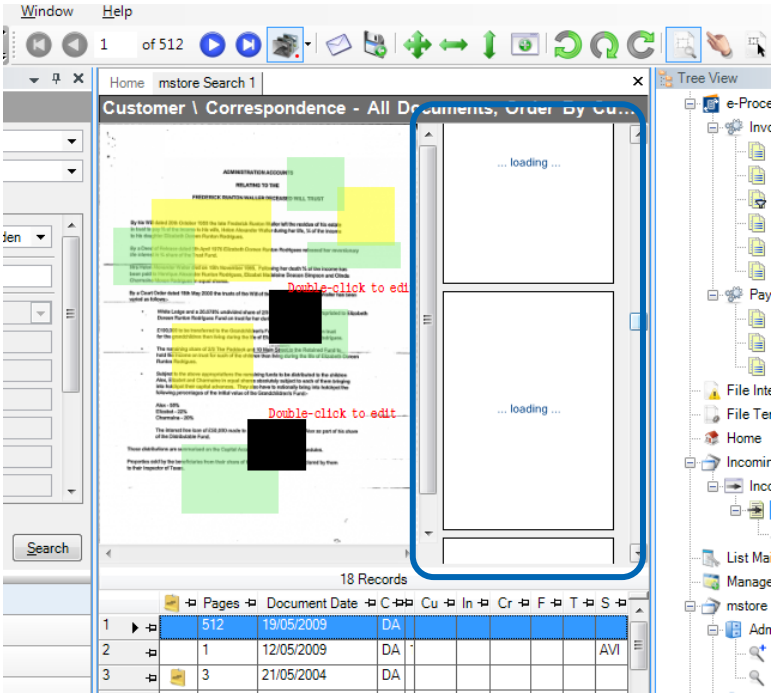


Figure 35

If the number of pages in the document exceeds 50, mstore will only render thumbnail images for the first 50 pages. If this is the case, scrolling down to the bottom of the thumbnail list will reveal a button allowing you to render thumbnails for the next 50 pages (Figure 36).

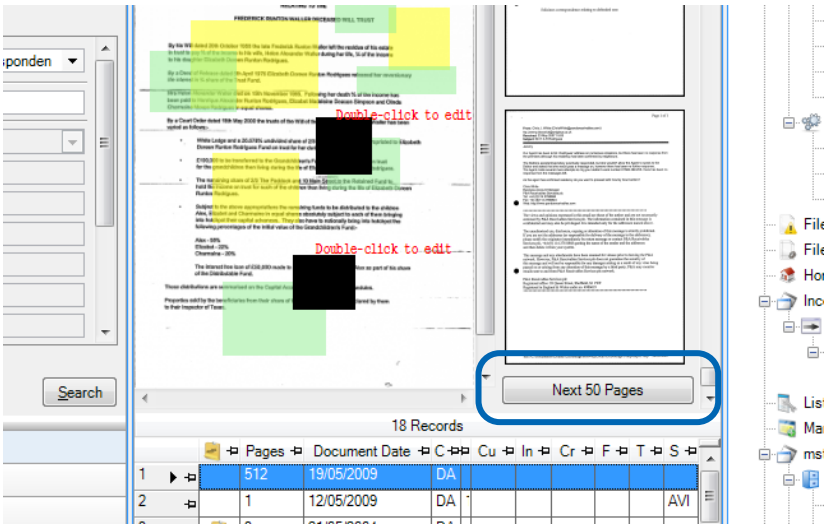


Figure 36

When the next batch of 50 thumbnails is rendered, the thumbnail images for the previous 50 are unloaded to save on resources and memory use. In the event that you need to return to the previous 50 thumbnails, scroll to the top of the thumbnail images list and a button will have appeared saying **Previous 50 Pages** (Figure 37). Click on this button to load the previous 50 thumbnail images and unload the current 50. You can continue in this way within the bounds of the document.

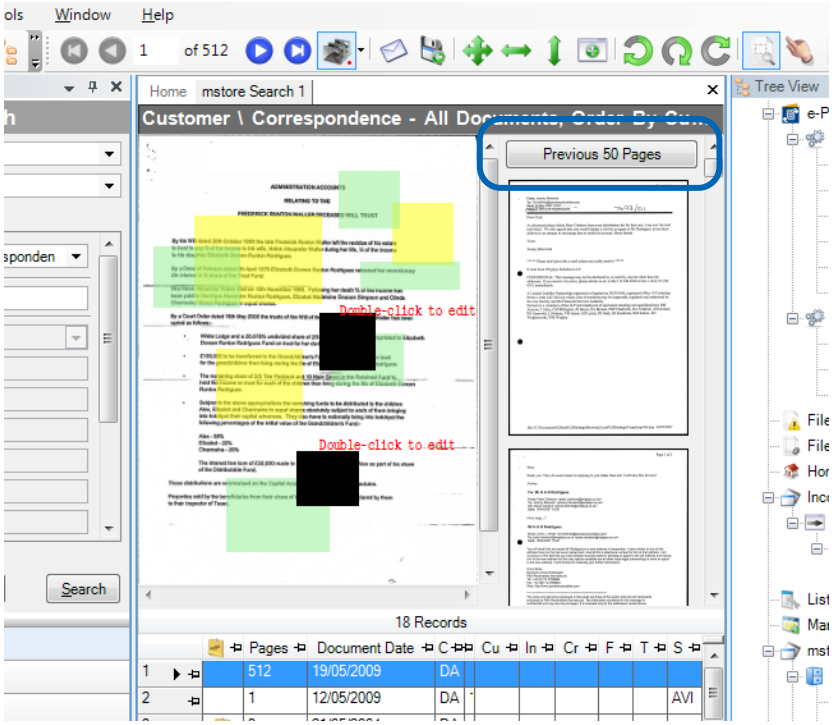


Figure 37

If you navigate through a document using the blue page navigation buttons on the toolbar, the thumbnails will synchronously follow you through the document. The page that you are currently viewing will be highlighted with a pale orange border, and the thumbnails will scroll automatically as you navigate through the document (Figure 38). If navigate beyond the page range that the current thumbnails have been generated for, mstore will automatically generate the next 50 or previous 50 thumbnails as required.

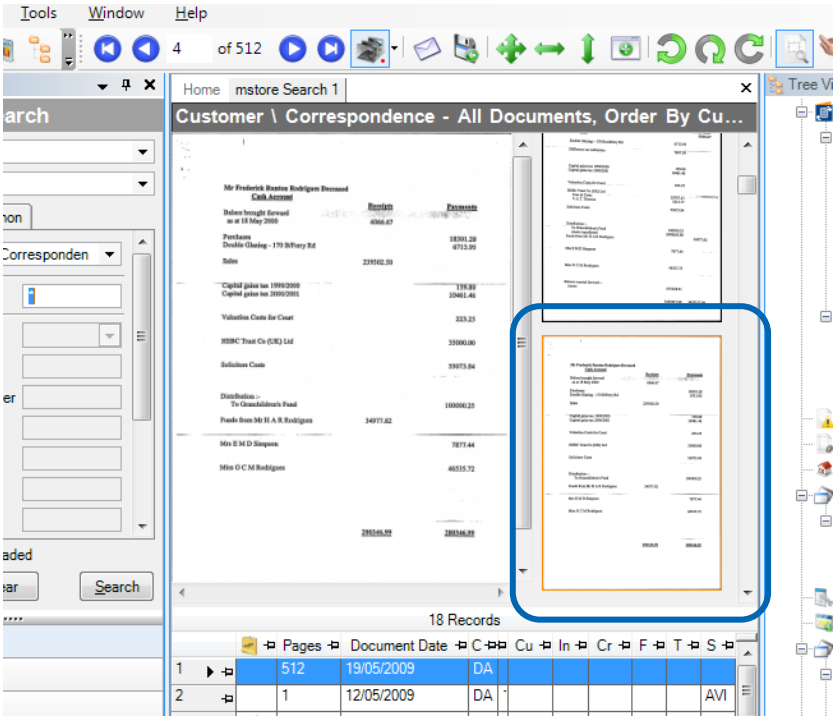


Figure 38

2.3.3 Email/Export Document

Figure 39

These two buttons (Figure 39) open their respective windows, they are explained in the email guide and export guide.

2.3.4 Best Fit

Figure 40

Best fit (Figure 40) works like zoom area but it changes the level of zoom to fit the document in the viewer horizontally, vertically or both. When a document is first loaded into the viewer it will choose to best fit it so the document fits both horizontally and vertically.

2.3.5 New Window

Figure 41

The new window tool (Figure 41) opens the document viewer in a separate window outside mstore so you can have more control over the size of the window and where it is. By opening several new windows you can right click on the windows task bar and select tile windows vertically (or horizontally) all the new windows will be displayed next to each other occupying the entire screen.

2.3.6 Rotation

Figure 42

Rotation (Figure 42) rotates the document clockwise by the specified amount. You can perform a 90°, 180° or 270° rotation on the document, these settings can be saved for next time the document is viewed by clicking on save preferences.

2.3.7 Zoom Area

Figure 43

The zoom area button (Figure 43) changes the mouse function to zoom in or out of the document. Left clicking zooms in and right clicking zooms out however by left clicking and dragging to select an area the viewer will zoom into the document to show that area.

2.3.8 Pan Document

Figure 44

Pan document (Figure 44) allows you to scroll around the document when it's zoomed in by dragging the document around to change which area is in view. This will change the mouse function from the default zoom, to change back click on the zoom icon.

2.3.9 Select Area

Figure 45

Select area (Figure 45) lets you highlight an area on the document which you can then copy.

2.3.10 Annotations

Figure 46

This button allows you to use annotations within mstore. If you have permission to use annotations then this button will be enabled and you will be able to add, edit or remove annotations on the document. The button itself is a dropdown menu, which contains the annotation tool sub-items seen in Figure 47. See the annotations section for more information.

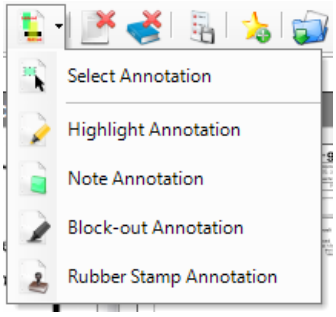


Figure 47

2.3.11 Delete Page

Figure 48

Delete page (Figure 48) removes the page currently being viewed from the document. The page is retrievable from looking at the documents historic versions in the document window.

If audit-trailing has been enabled on your system, you may be prompted for a ‘reason’ for deleting the page before the operation is carried out. This reason can be viewed at a later stage by anyone who possesses the appropriate security permissions.

2.3.12 Delete Document

Figure 49

Delete document (Figure 49) removes the current document from the cabinet. An administrator can undo this via the deleted documents tool in mstore however after using delete document you will not be able to find it again unless it is undeleted.

Again this operation is covered by audit-trailing. You will be prompted to enter a 'reason' for deleting the document, which can then be viewed later by anybody with the correct security permissions.

2.3.13 Save Preferences

Figure 50

By clicking on save preferences (Figure 50) you can save some of the settings on how the document is being viewed such as rotation. When the button is clicked, a dialog appears (Figure 51) asking if the preferences should be applied to you (i.e. the current user), or all users. You can also apply the same preferences to all the pages in the document, if the file happens to be multipage.

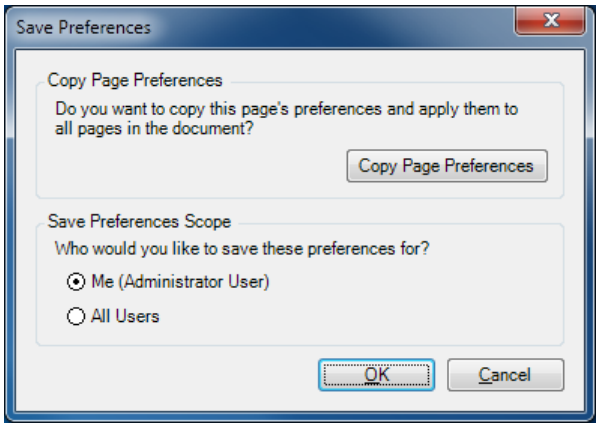

Save Preferences
Copy Page Preferences
Do you want to copy this page's preferences and apply them to all pages in the document?
Copy Page Preferences
Save Preferences Scope
Who would you like to save these preferences for?
Me (Administrator User)
All Users
OK
Cancel

Figure 51

2.3.14 Favourites

Figure 52

Clicking on the Favourites icon in Figure 52 will add this document to your favourites in 'My mstore', and the icon will then change to a red colour to mark that it is in your favourites, re-clicking it removes it from your favourites.

2.3.15 Edit References

Figure 53

Edit references (Figure 53) opens the indexing window allowing you to change any of the references so that it can be re-indexed into mstore with the changed references.

2.3.16 Printing Documents

Printing documents is explained in the Printing Guide.

2.4 Document Tabs

2.4.1 Tasks

Tasks are explained in the Tasks guide.

2.4.2 Related Documents

Related Documents are explained in the Related Documents guide

2.4.3 Versions

Versions are explained in the Versions guide

2.4.4 History

History shows every action that has occurred on the document and by which user, this includes viewing the document. Depending on the event, '**Event Details'** will show you more history information when you select that history event in the list (Figure 54).

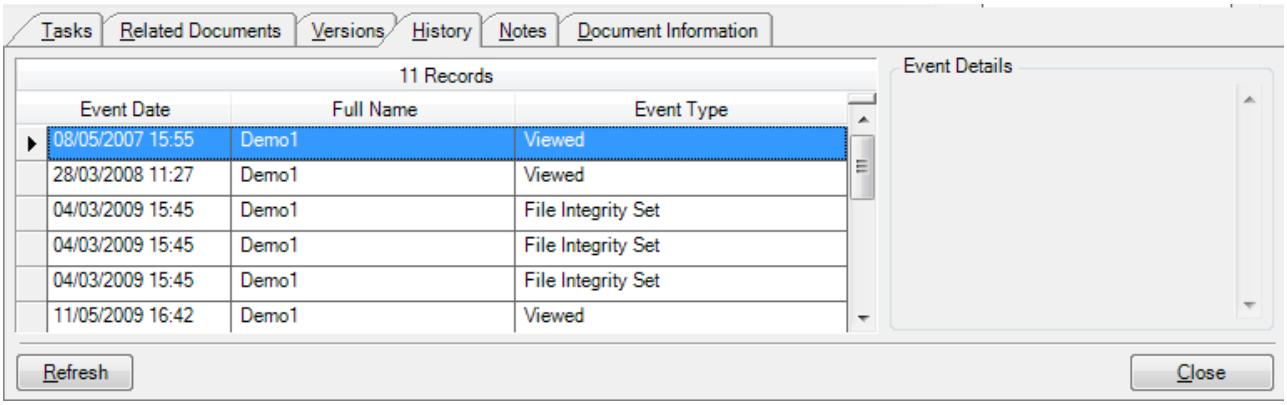


Figure 54

2.4.5 Notes

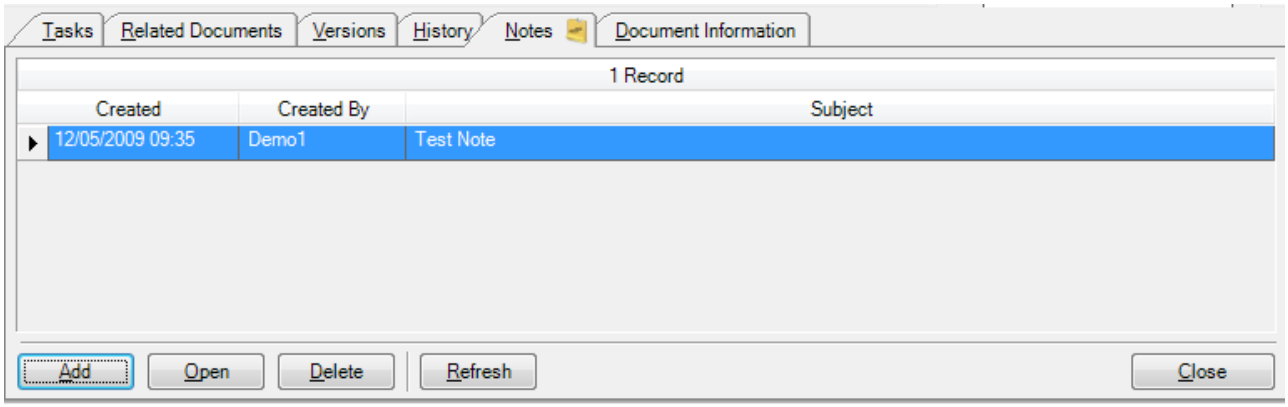


Figure 55

To Add a note to a document click on the add button (Figure 55), you will then see a form (Figure 56) where you can enter a subject for your note and the note itself. Click 'Save' and it will be added to the list.

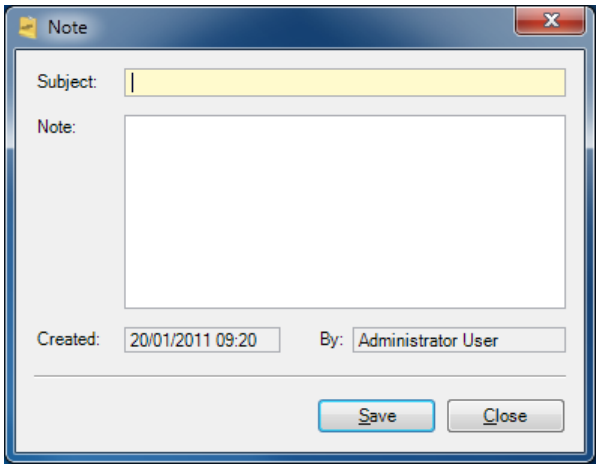


Figure 56

Click on open to view the note in a form (Figure 57), click on the edit button to change the text and then save.

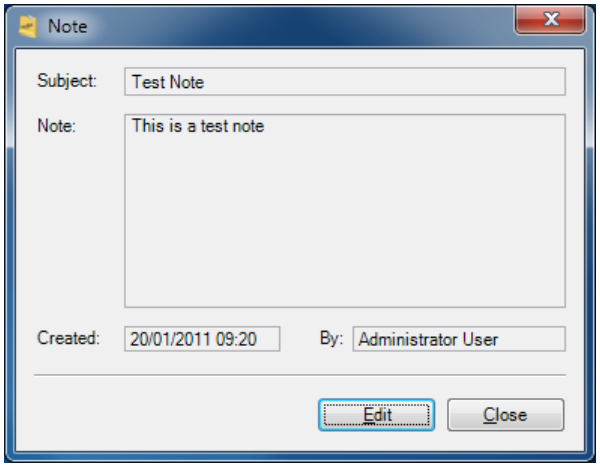


Figure 57

You can also delete notes in the list, but you can only edit and delete notes which you have created. You can however view everybody's notes on the document.

Creating, editing and deleting notes do not affect versioning.

2.4.6 Document Information

The document information tab displays all the information about the document (Figure 58).

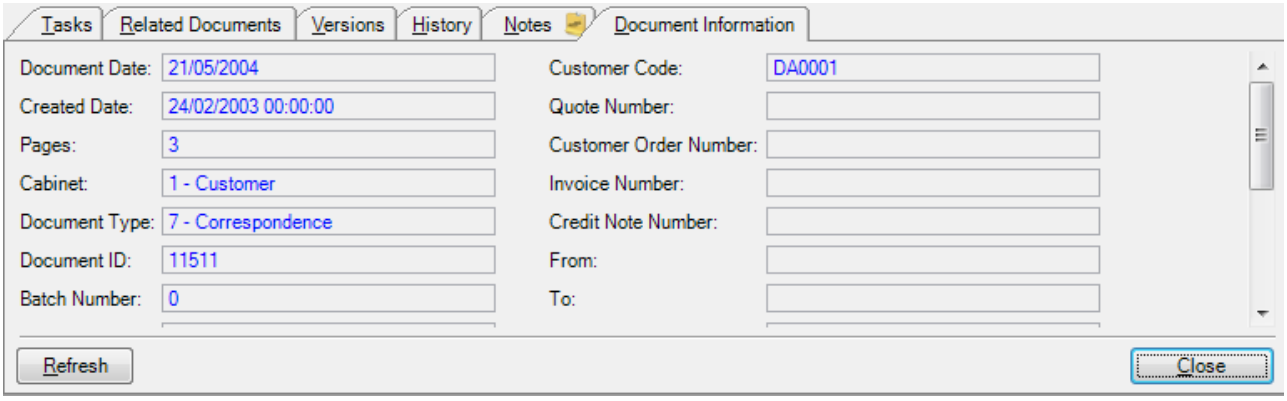


Figure 58

2.4.7 Additional Data

When documents are indexed, mstore attempts to obtain certain bits of information about the file. The data collected isn't particularly extensive and there may be occasions where extra information is available which mstore alone cannot display.

This is where the 'Additional Data' tab comes in. This tab allows you to view extra information about a document, provided it is available and configured by the administrator. The example in Figure 59 shows additional document information from a document that has been captured by OCR. The information on this tab wouldn't normally be available using mstore alone. Another possible use could be image format information (width,

height, size, resolution, date of capture, camera type etc) when photographs are indexed to mstore. All of this information could be made available through this tab.

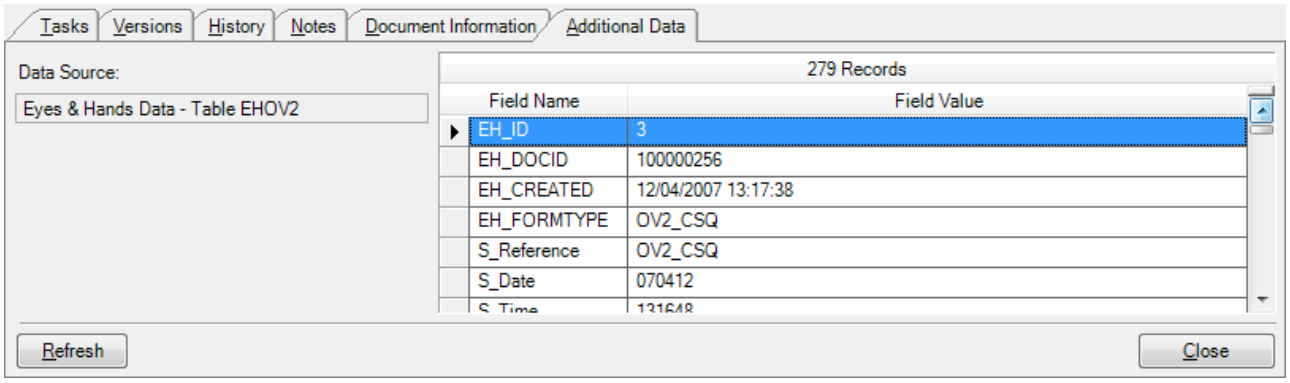


Figure 59

NOTE
The ‘Additional Data’ tab won’t be displayed for all cabinets and document types. It will only be available for certain cabinets provided that it has been configured by your system administrator.

3 Storing Documents

3.1 What's in this Chapter

With mstore you can,

- Import scanned documents from a scanner or other multi-function device using the Incoming Documents feature.
- Index any file type in Windows into mstore.

This chapter will explain,

- Sending Documents to Incoming Documents
- Indexing Documents
- Directly Acquiring Documents from a Scanner

3.2 Sending Documents to Incoming Documents

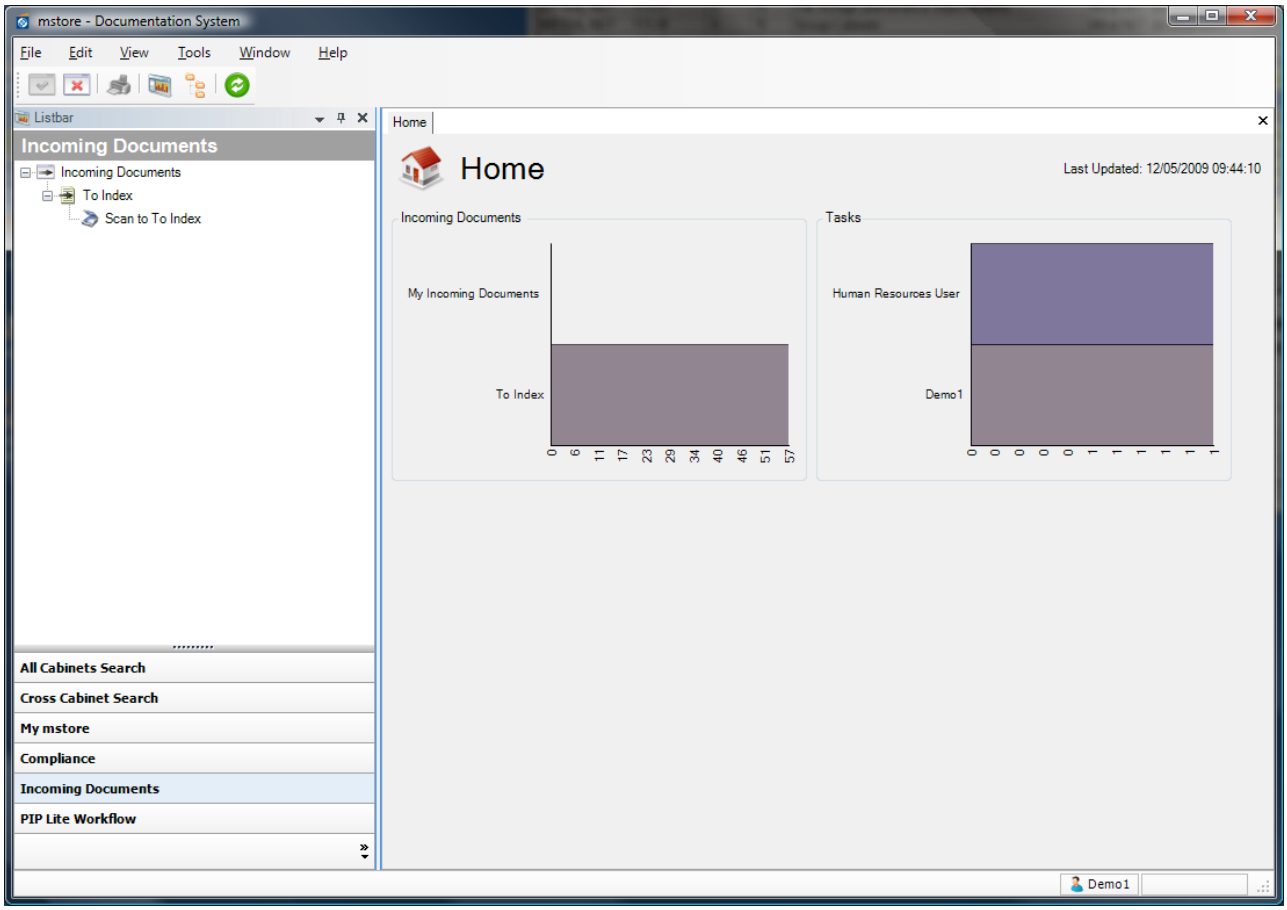


Figure 60

To index documents into mstore select **Incoming Documents** in the list bar (Figure 60). In the list make sure **Incoming Documents** is expanded and select **To Index**.

Figure 61

Press the **Import** button to find a document to place in **Incoming Documents** (Figure 61).

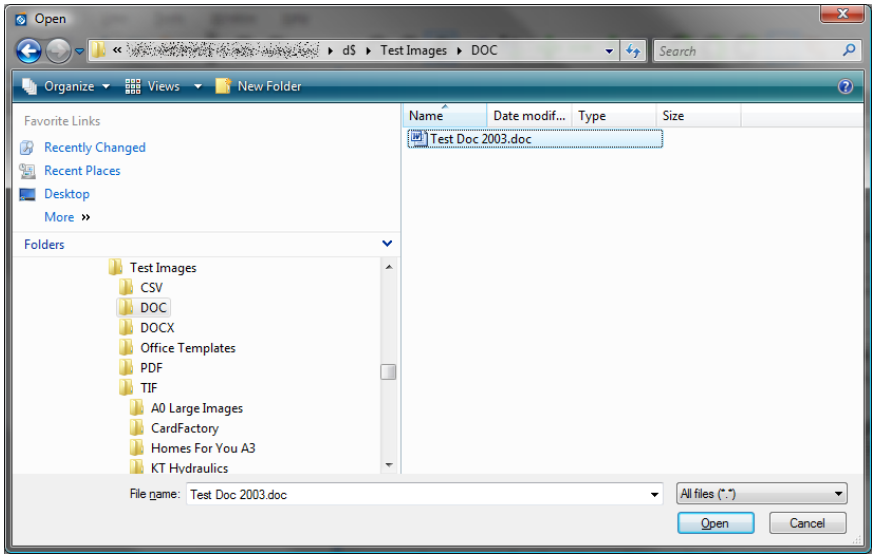


Figure 62

The document will now be in **Incoming Documents**, select it in the list and double click to index the document.

3.3 Indexing Documents

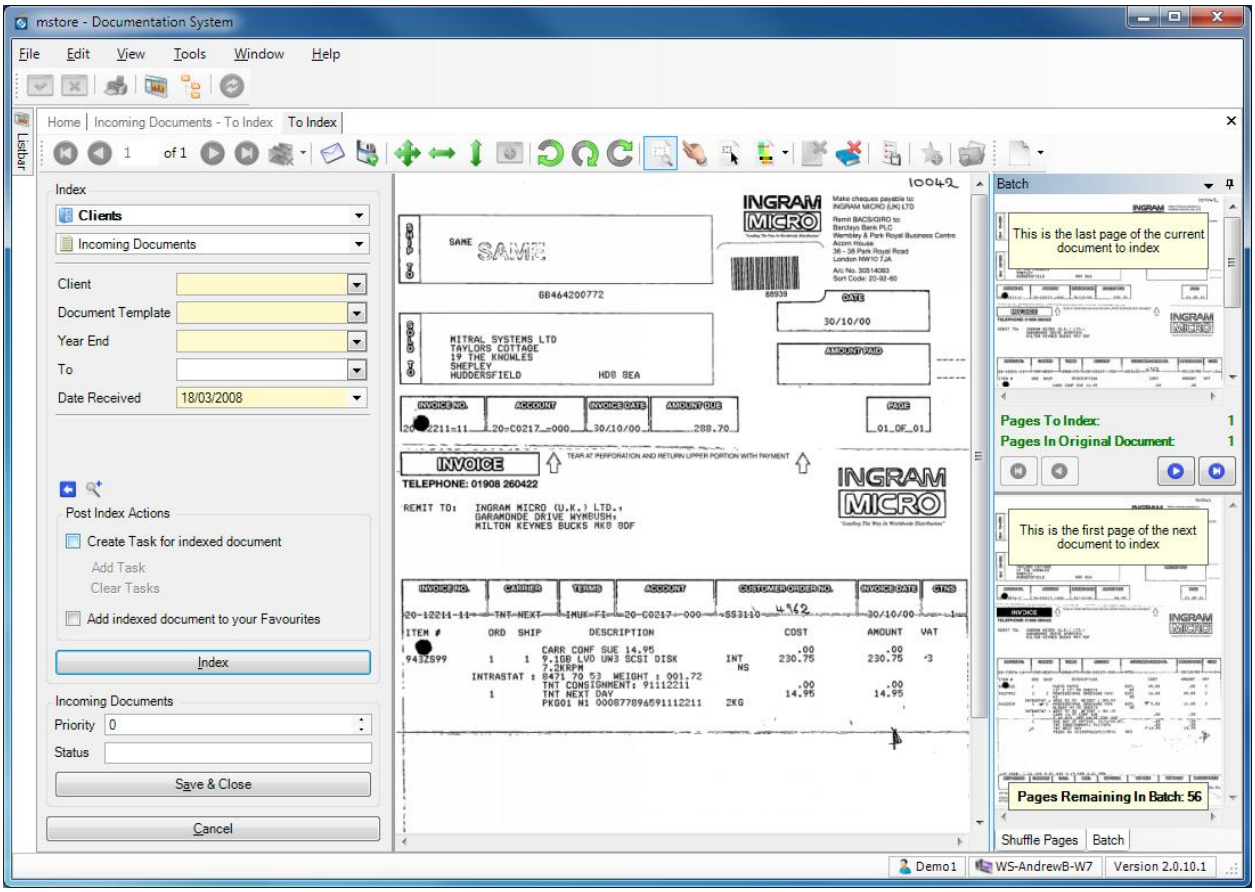


Figure 63

To index the document you need to select the pages to index in the panel on the right and enter the references on the left (Figure 63). On the toolbar at the top of the window there is a button which appears like a sheet of paper (see Figure 64). When clicked this button will drop down three different options, which control which page the **Batch** window will navigate to when loading the next document.

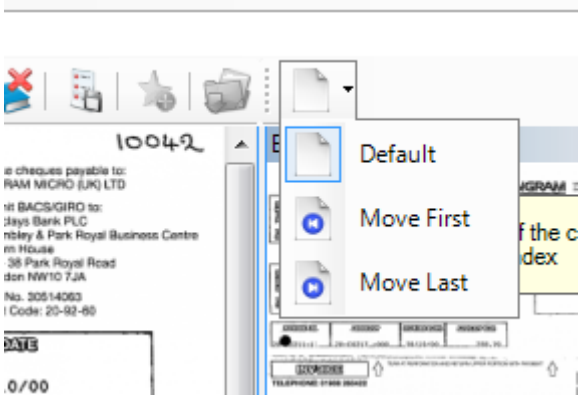


Figure 64

The setting controls the **Pages To Index** value in the **Batch** window of the indexing screen. When dealing with multi-page documents, the **Pages To Index** value denotes how many pages from the document will be split away from the main document and indexed as a new document. If you have a 50 page document and you use the arrows to set the **Pages To Index** value to 23, the first 23 pages of the batch will be split from the 50 page document, and indexed as a new 23 page document. The remaining 27 pages will remain in the batch window for further indexing. The values for this setting are…

Setting	Purpose
Default	Uses the current default setting for splitting multi-page documents and batches. This setting defaults to **Move Last** if the setting has never been changed in the past. Otherwise the default splitting mode is dictated by whichever option was selected last (e.g. if the last mode to be selected was **Move First**, this becomes the default when **Default** is selected).
Move First	When a multi-page document / batch is selected, setting this splitting option will result in only the first page being selected for indexing.
Move Last	As above but instead of only selecting the first page for splitting away from the main document / batch, this setting will select the entire document for indexing.

When entering the references first select the cabinet you want to index to, then the document type and then enter the common and document references.

It is possible to update the version of documents already in mstore, or add pages to an existing document, by entering the criteria and then pressing the button. This is explained in the versions guide.

Index will index the document with the information supplied in the panel.

3.4 Directly Acquiring Documents from a Scanner

With mstore you can index documents directly to Incoming Documents using any TWAIN-compatible scanner. This eliminates the need to scan documents using a third party application, and then adding the files to mstore using the 'Import' facility.

There are a number of ways that the documents can be directly acquired from a scanner.

1. **Scan and Index**

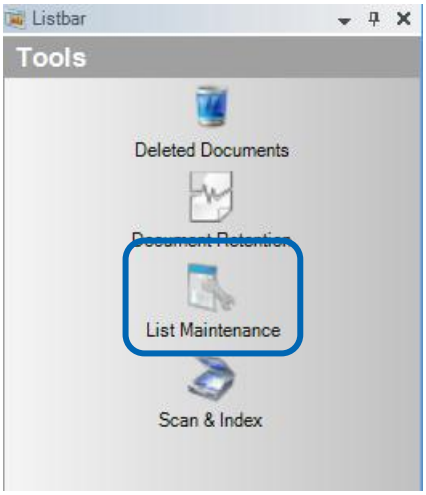


Figure 65

The Scan and Index tool can be accessed via an icon on the list bar as in Figure 5.

This tool is especially suited to performing quick scans of individual documents where immediate indexing of the document to mstore is required.

When the tool is clicked it will open the scanning screen shown below.

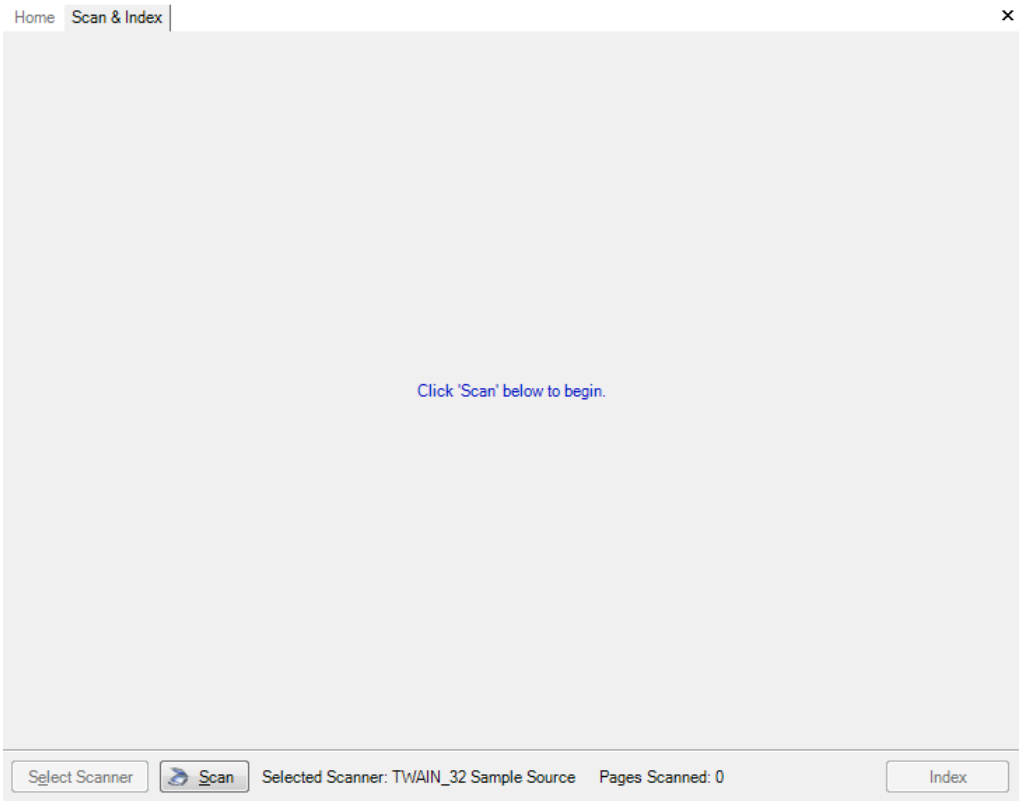


Figure 66

The ‘Select Scanner’ button will allow you to select the scanner which will be used for acquiring the images. This will display a dialog showing a list of scanner drivers that are installed on the computer as below. The appearance of the dialog may differ depending on the drivers being used by the system.

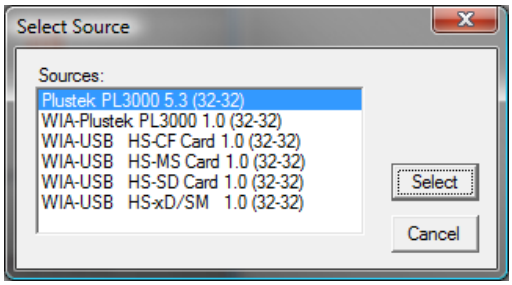


Figure 67

Once a scanning device is selected, clicking the ‘Scan’ button will display the TWAIN acquisition dialog for the selected scanner. As with the scanner selection dialog above, the TWAIN acquisition dialog will differ depending on the manufacturer and model of scanner being used. The screenshot below shows a sample acquisition dialog which has been displayed after clicking the ‘Scan’ button.

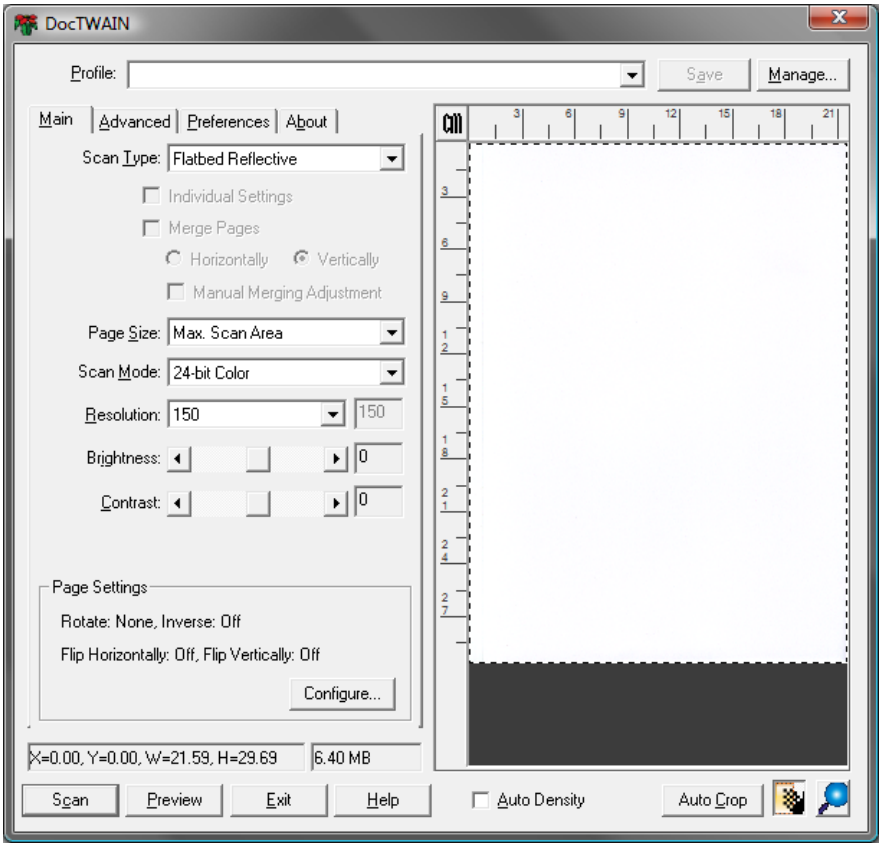


Figure 8

Finally the ‘Index’ button will display the standard mstore indexing screen to allow the document to be indexed away to its designated location.

2. ‘Scan to To Index’ Option

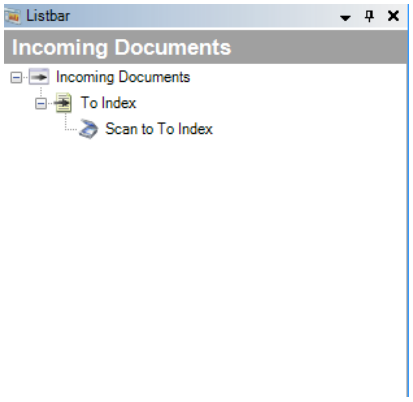


Figure 68

If Incoming Documents scanning is enabled, each of the Incoming Documents cabinet items will have a ‘Scan to ...’ option below it (see Figure 9).

When the ‘Scan to ...’ item is clicked it opens the scanning dialog described on the previous page. The primary difference is that this dialog has two buttons

instead of one, as it allows the creation of saved ‘batches’ as well as direct document indexing.

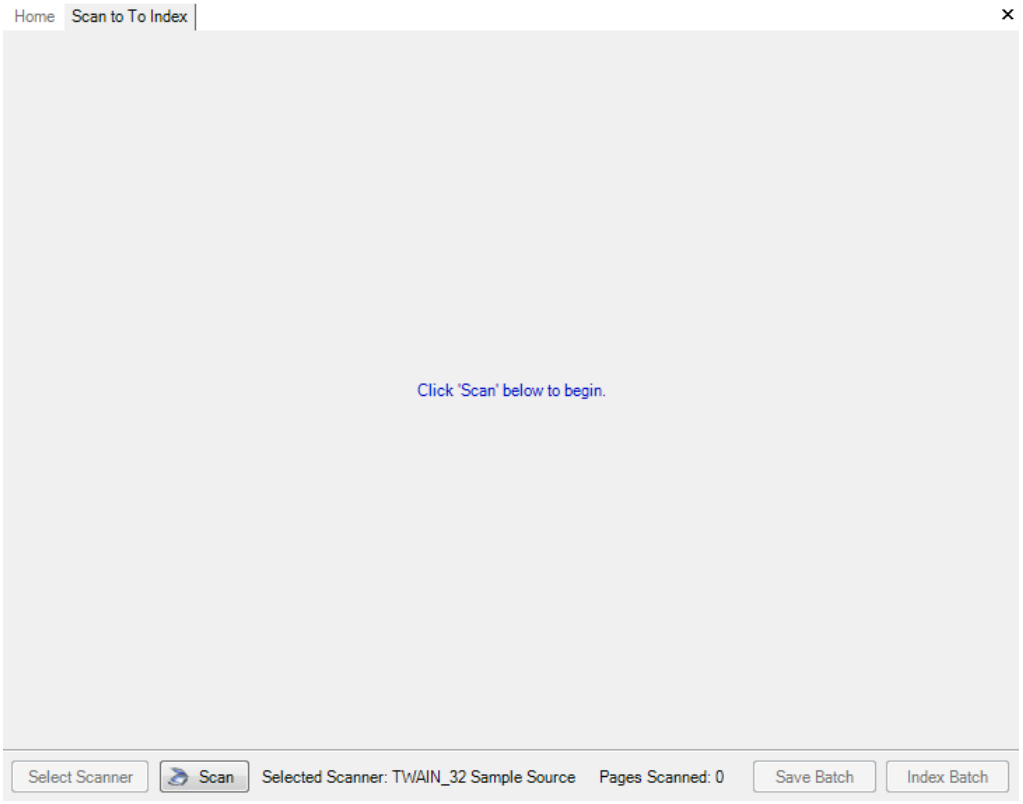


Figure 69

When using this feature of mstore you can also select the type of batch that you want to create. The choice of types depends on the type of batches that you want to create. Some batches feature a large volume of pages, but will only be split a few times into large documents. However there are times when you may scan a large volume of pages, but need to split the document down into a large quantity of 1 or 2 page documents. This is where the batch type selection comes in (Figure 11). Selecting the **Don’t Ask Me This Again** option will retain your previous selection and not show the message again.

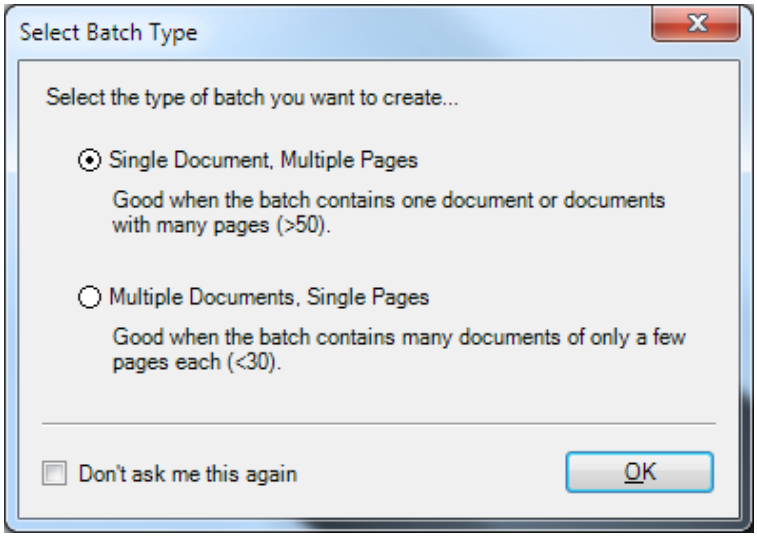

Select Batch Type
Select the type of batch you want to create...
Single Document, Multiple Pages
Good when the batch contains one document or documents with many pages (>50).
Multiple Documents, Single Pages
Good when the batch contains many documents of only a few pages each (<30).
Don't ask me this again
OK

Figure 70

Clicking the ‘Save Batch’ button will place the scanned document in the Incoming Documents queue, and will then clear the screen ready for the next scan. These documents can be accessed at a later time and indexed to mstore as appropriate.

Clicking the ‘Index Batch’ button will open the scanned image in mstore, and will display the indexing dialog allowing you to index the document away to its designated location.

If you proceed to index pages from the batch but close the form before all the pages have been indexed away, mstore will display the following message to alert you to this.

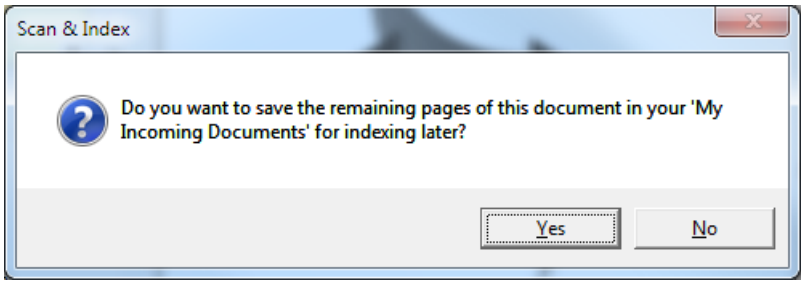

Scan & Index
Do you want to save the remaining pages of this document in your 'My Incoming Documents' for indexing later?
Yes
No

Figure 71

3.0 Incoming Documents ‘Scan’ button

When you open one of the Incoming Documents folders, a new scan button will appear in the toolbar at the top of the screen. This can be used in much the same way as the ‘Import’ and ‘Combine’ buttons. When the ‘Scan’ button is clicked, it will open the scanning form as with the ‘Scan to ...’ method. This will allow you to scan batches of documents, or to perform direct scan and index operations.

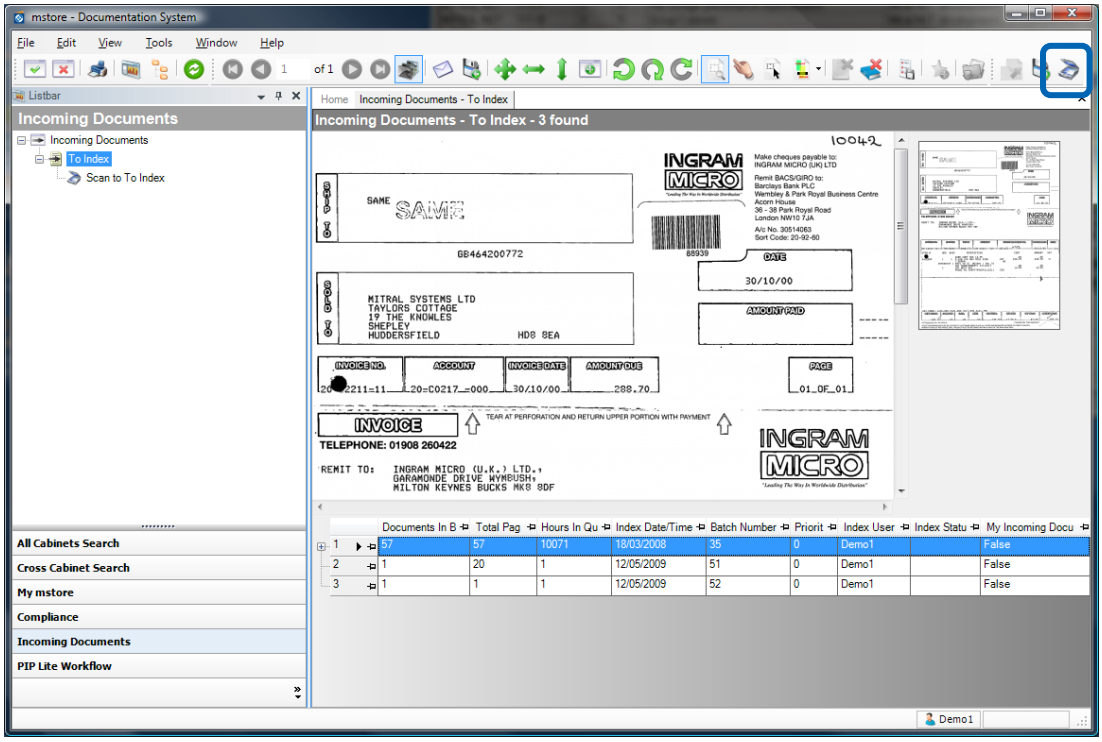

mstore - Documentation System
File Edit View Tools Window Help
Listbar
Incoming Documents
Incoming Documents
To Index
Scan to To Index
All Cabinets Search
Cross Cabinet Search
My mstore
Compliance
Incoming Documents
PIP Lite Workflow
Home
Incoming Documents - To Index
Incoming Documents - To Index - 3 found
INGRAM MICRO
SAMPLE
GB464200772
MITRAL SYSTEMS LTD
TAYLORS COTTAGE
19 THE KNOWLES
SHEPLEY
HUDDERSFIELD
HD8 8EA
DATE
30/10/00
AMOUNT PAID
INVOICE NO.
ACCOUNT
INVOICE DATE
AMOUNT DUE
PAGE
01_OF_01
INVOICE
TELEPHONE: 01908 260422
REMIT TO: INGRAM MICRO (U.K.) LTD.,
GARAMONDE DRIVE WYMBUSH,
MILTON KEYNES BUCKS MK8 8DF
Documents In B
Total Pag
Hours In Qu
Index Date/Time
Batch Number
Priorit
Index User
Index Statu
My Incoming Docu
1 57 57 10071 18/03/2008 35 0 Demo1 False
2 1 20 1 12/05/2009 51 0 Demo1 False
3 1 1 1 12/05/2009 52 0 Demo1 False
Demo1

Figure 72

4 Editing References

4.1 What's in this Chapter

With mstore you can,

- Change a document's references
- Shuffle a documents pages
- Re-index a document into a new cabinet, document type
- Append the document or part of the document to another document
- Replace a document with the current document
- Replace a document with the document being edited

This chapter will explain,

- Finding the Edit References form
- Editing References
- Appending to or Overwriting Existing Documents
- Manipulating Pages
- Re-Indexing
- Audit Trails

4.2 Finding the Edit References form

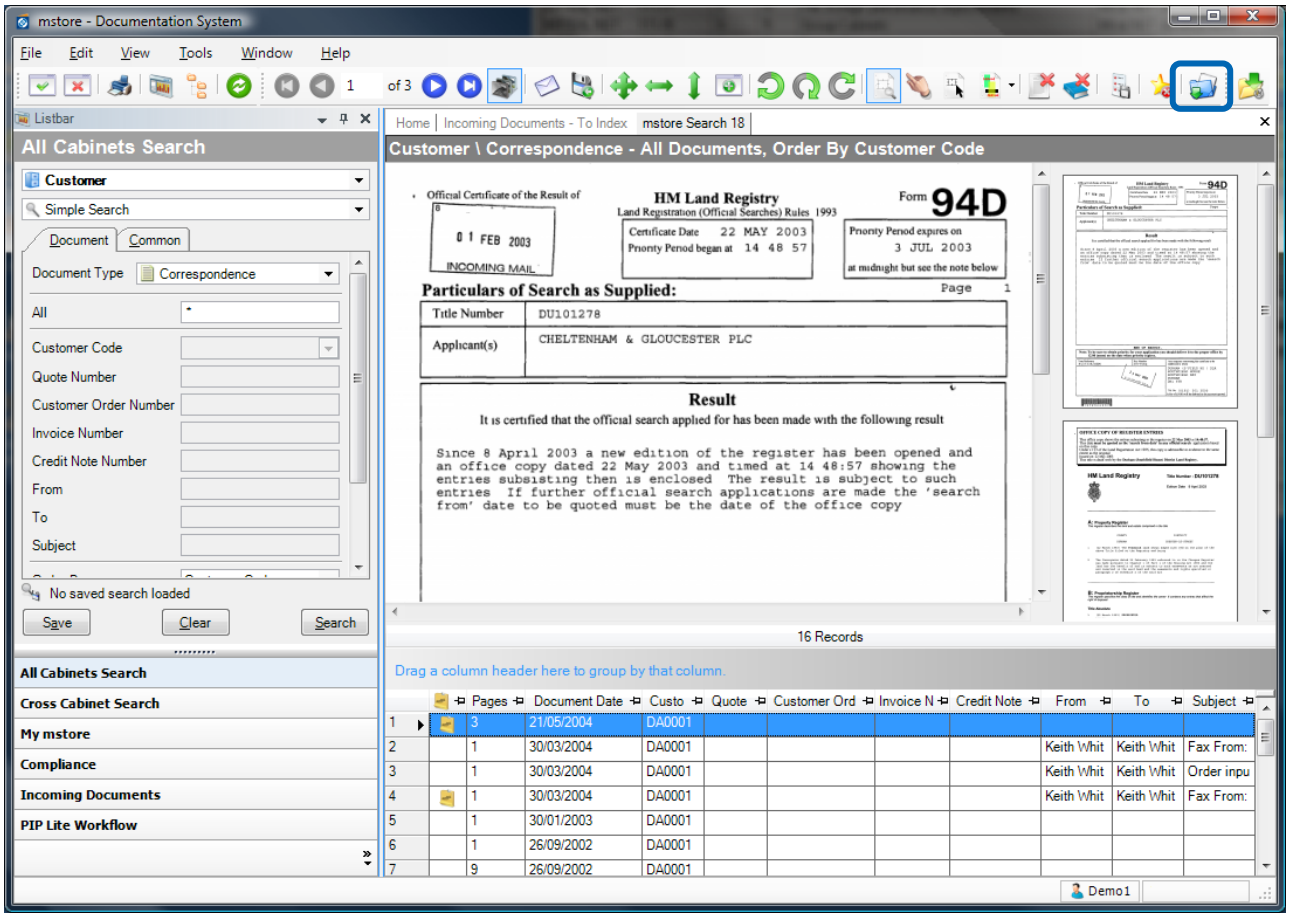

mstore - Documentation System
File Edit View Tools Window Help
Listbar
All Cabinets Search
Customer
Simple Search
Document Common
Document Type Correspondence
All
Customer Code
Quote Number
Customer Order Number
Invoice Number
Credit Note Number
From
To
Subject
No saved search loaded
Save Clear Search
All Cabinets Search
Cross Cabinet Search
My mstore
Compliance
Incoming Documents
PIP Lite Workflow
Home | Incoming Documents - To Index | mstore Search 18
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
HM Land Registry
Land Registration (Official Searches) Rules 1993
Form 94D
Certificate Date 22 MAY 2003
Priority Period began at 14 48 57
Priority Period expires on 3 JUL 2003
at midnight but see the note below
Particulars of Search as Supplied:
Page 1
Title Number DU101278
Applicant(s) CHELTENHAM & GLOUCESTER PLC
Result
It is certified that the official search applied for has been made with the following result
Since 8 April 2003 a new edition of the register has been opened and an office copy dated 22 May 2003 and timed at 14 48:57 showing the entries subsisting then is enclosed The result is subject to such entries If further official search applications are made the 'search from' date to be quoted must be the date of the office copy
16 Records
Drag a column header here to group by that column.
Pages Document Date Custo Quote Customer Ord Invoice N Credit Note From To Subject
1 3 21/05/2004 DA0001
2 1 30/03/2004 DA0001 Keith Whit Keith Whit Fax From:
3 1 30/03/2004 DA0001 Keith Whit Keith Whit Order inpu
4 1 30/03/2004 DA0001 Keith Whit Keith Whit Fax From:
5 1 30/01/2003 DA0001
6 1 26/09/2002 DA0001
7 9 26/09/2002 DA0001
Demo1

Figure 73

To edit a document's references you must view a document either in the search results or document's own form. After selecting a document click on the Edit References button in the toolbar (Figure 73).

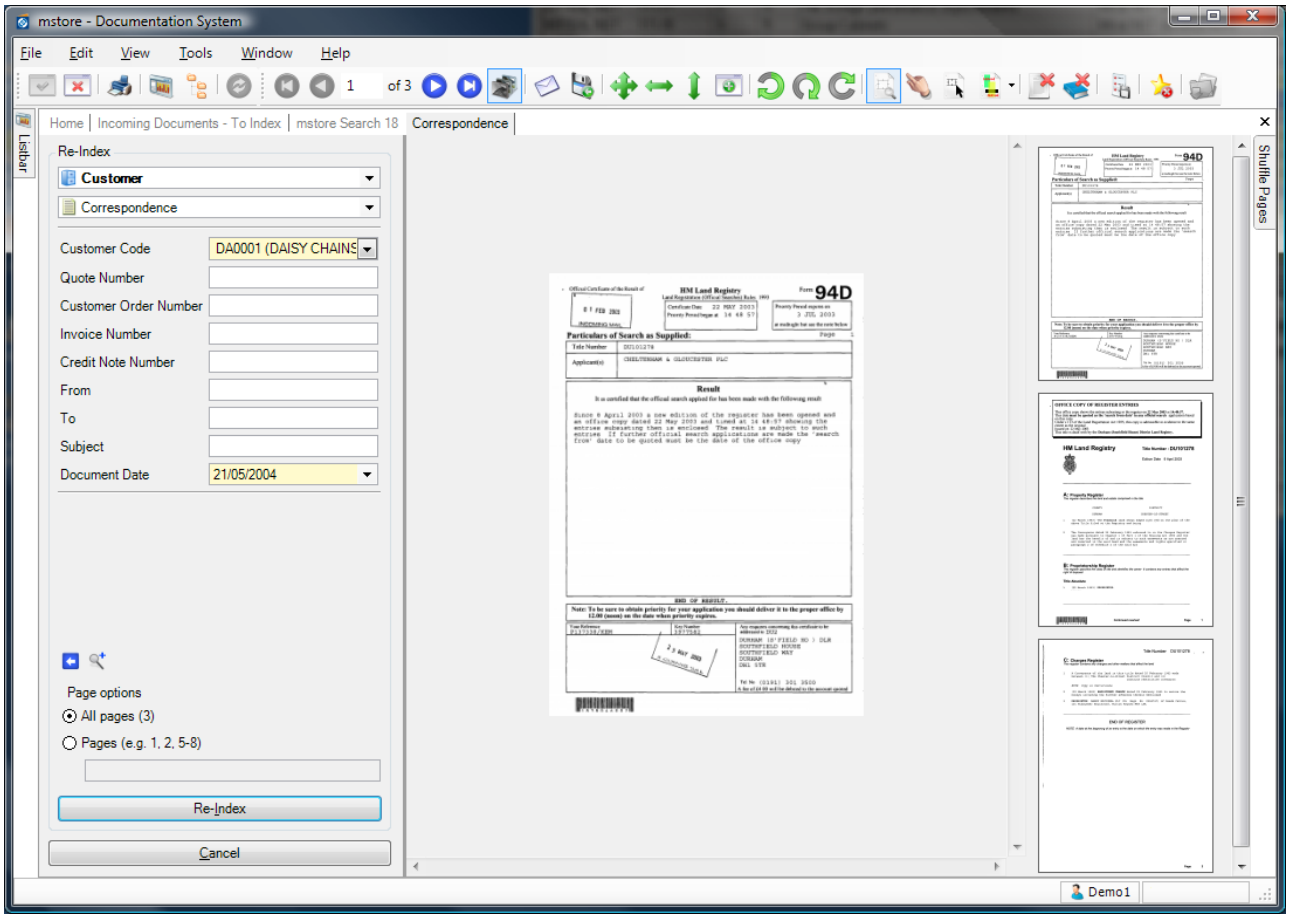


Figure 74

This will open the Re-Indexing form in a new tab. This is the same form used to index from Incoming Documents; the only difference is that there is no side bar to split pages.

This form allows you to change the documents references, move it to another document type or cabinet and also manipulate the pages.

4.3 Editing References

At the top of the left sidebar the document's cabinet, type and references can be edited.

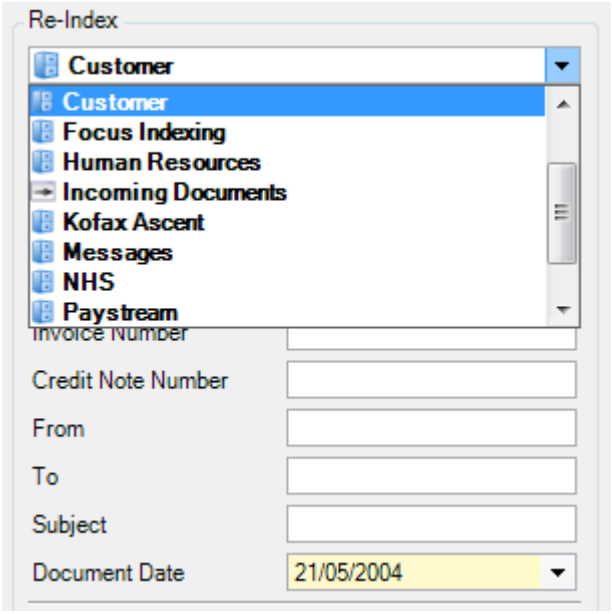


Figure 75

By using the top drop down box you can change the cabinet that the document is currently in.

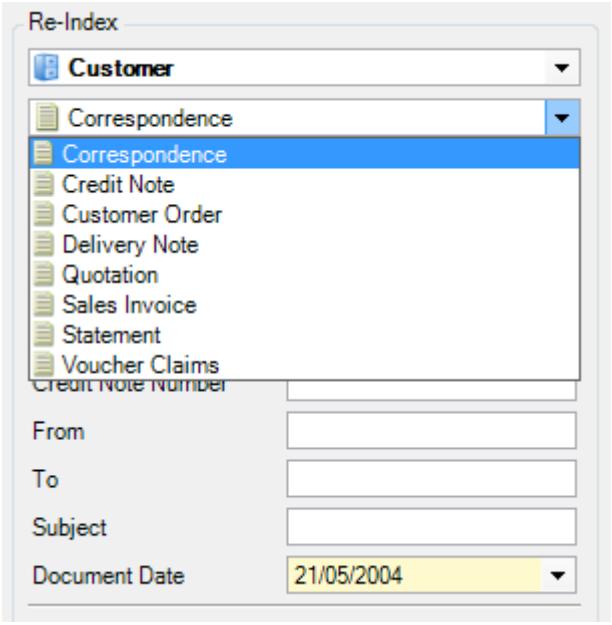


Figure 76

The second drop down box allows you to change the document's type to one within the selected cabinet.

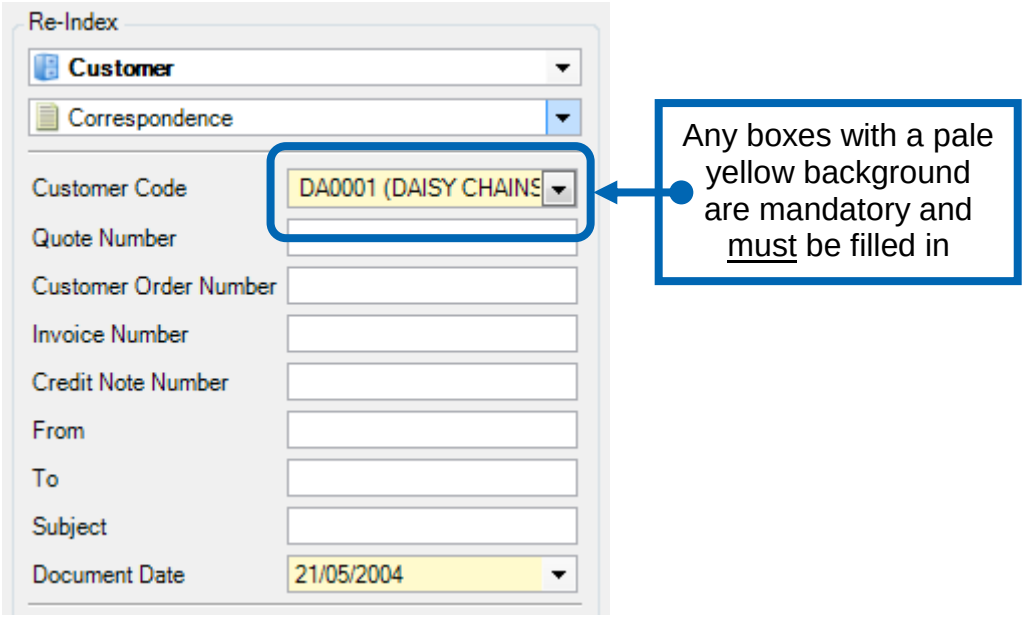


Figure 77

The references with a pale yellow background are required fields which must be entered or the validation check will fail. The other references are optional.

4.4 Appending to or Overwriting Existing Documents

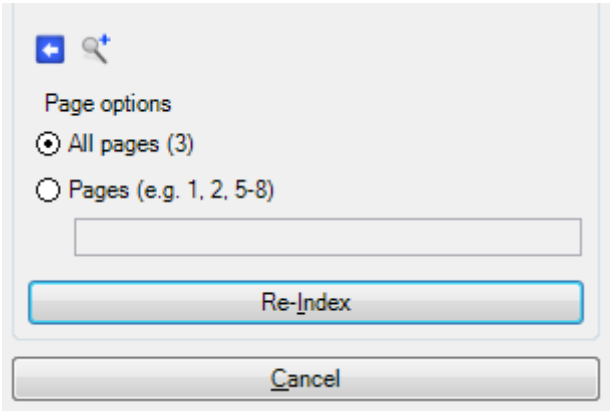


Figure 78

Like when indexing from incoming documents after you have entered your references you can lookup a document to overwrite. See the Storing documents section for more information on this.

4.5 Manipulating Pages

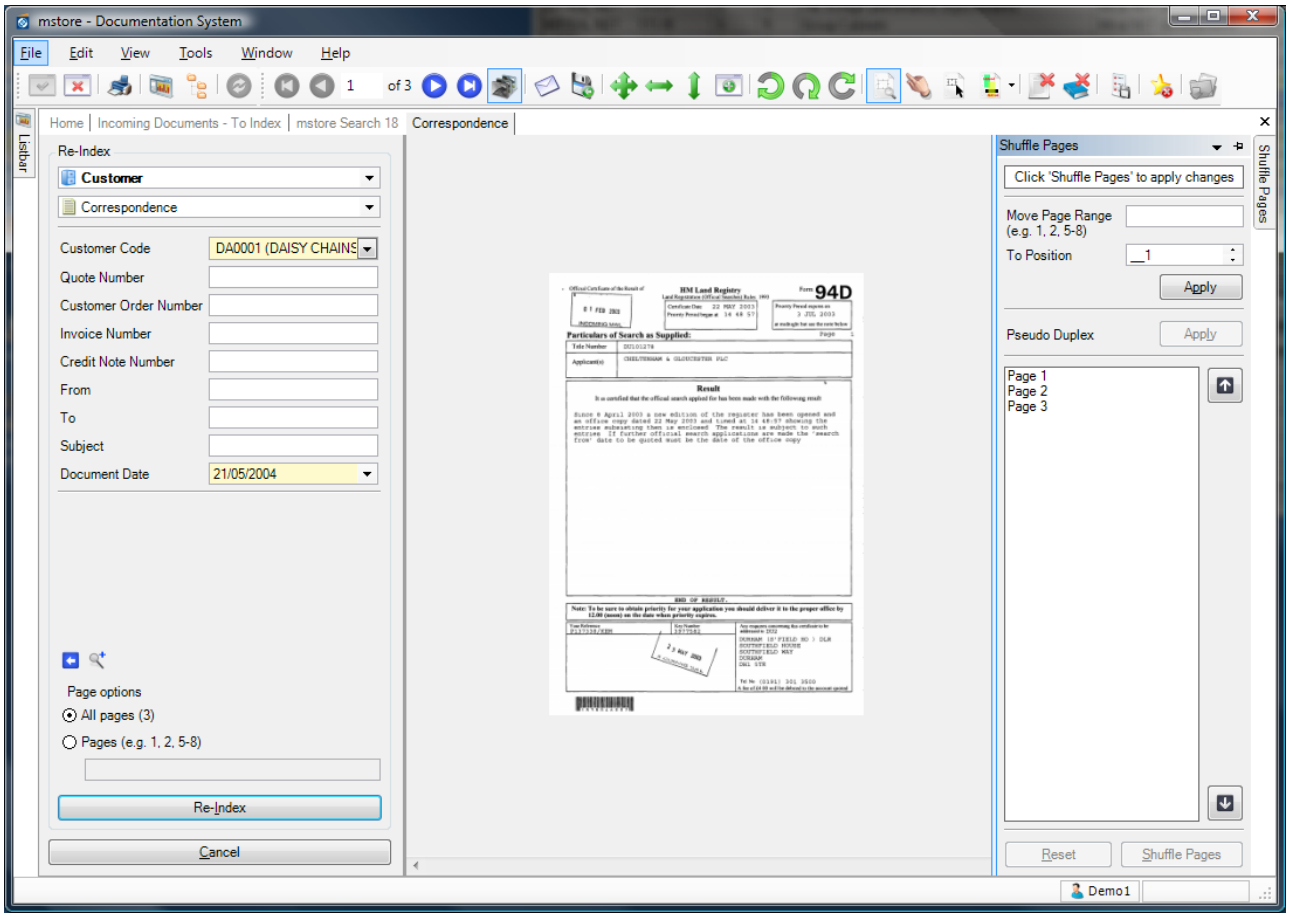


Figure 79

To shuffle the pages simple select a page and click on the up and down arrow buttons, or use the text boxes at the top to perform bulk changes.

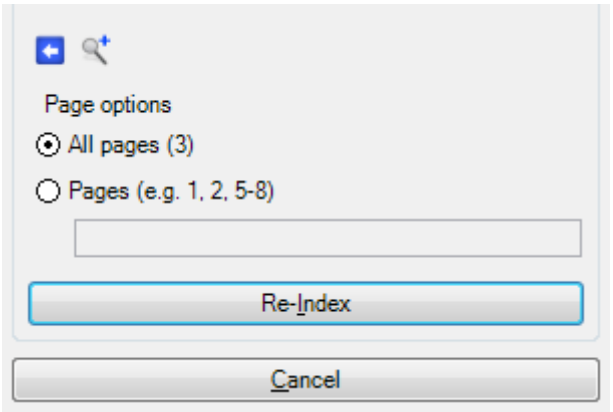


Figure 80

Before you re-index you can enter pages and page ranges to only re-index the pages specified.

4.6 Re-Indexing

When you have finished click on Re-Index to re-index the document (or pages) with the references entered. mstore will first check that the information is valid before re-indexing, if successful the form will close and you will return to the previous form.

4.7 Audit Trails

From version 2.0.4.1 of mstore, a new audit trail facility was added to the system. This permission-based system will prompt you for a ‘reason’ as to why you are performing a particular task on a document, such as re-indexing as in this case. The system administrator has the ability to decide what operations require auditing, and which don’t by using a system of mstore permissions.

If your system administrator has enabled auditing for re-index operations, another screen will pop up after clicking the ‘Re-Index’ button prompting you for a reason as to why you are re-indexing the selected document (Figure 81).

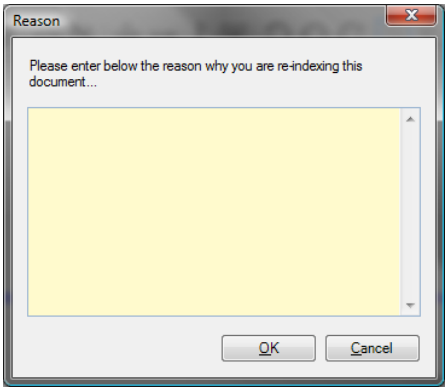


Figure 81

Simply enter a short description as to why you are performing the re-index operation, and click the ‘OK’ button to proceed. Be aware that any comments you enter may be reviewed later by any mstore user who possesses the necessary security permissions.

5 Annotating a Document

5.1 What's in this Chapter

With mstore you can,

- Highlight areas of a document
- Add Notes to a document
- Rubber Stamp text onto a document
- Block-out an area of a document
- Modify and delete any existing Annotations

This chapter will explain,

- Accessing The Annotation Tools
- Using the 'Highlight' Annotation
- Using the 'Note' Annotation
- Using the 'Block-Out' Annotation
- Using the 'Rubber Stamp' Annotation
    - Free Text
    - Standard Captions
    - Today's Date
    - My User Details
    - Creating the stamp
- Moving and Resizing Annotations
- Deleting Annotations

5.2 Accessing The Annotation Tools

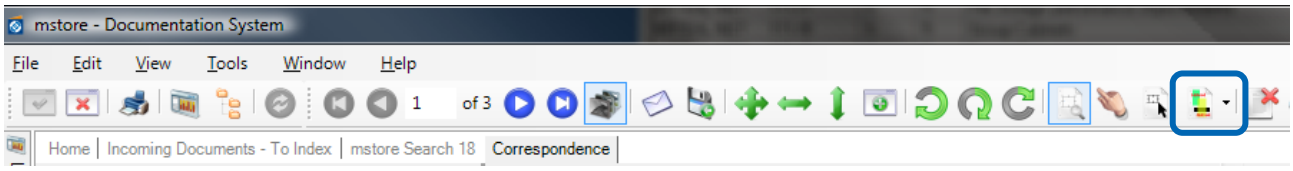


Figure 82

The annotation tools are accessed using the annotation button seen in Figure 82. When this button is clicked, the annotation tools are displayed on a dropdown menu below it (Figure 83). The tools themselves will be explained further on in this chapter.

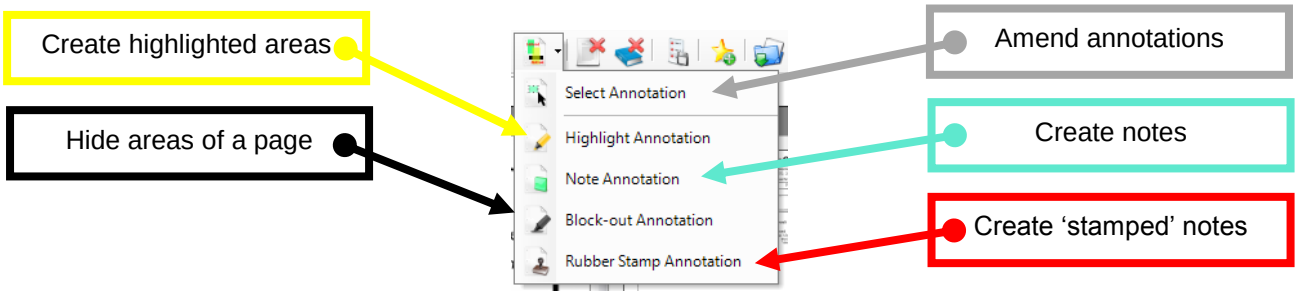


Figure 83

In order to be able to annotate a document, you must either be an administrator or have the 'Can Annotate' permission. If you don't have either of these credentials, the annotation button will be disabled.

5.3 Using the 'Highlight' Annotation

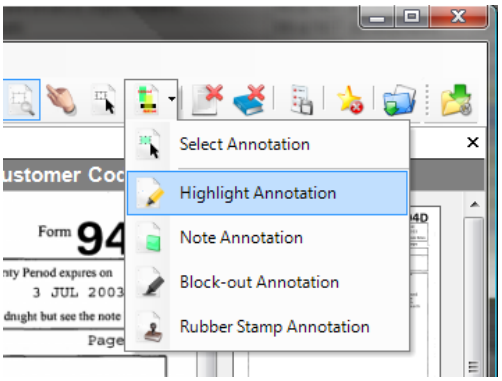


Figure 84

Select 'Highlight Annotation' on the annotation toolbar (Figure 84).

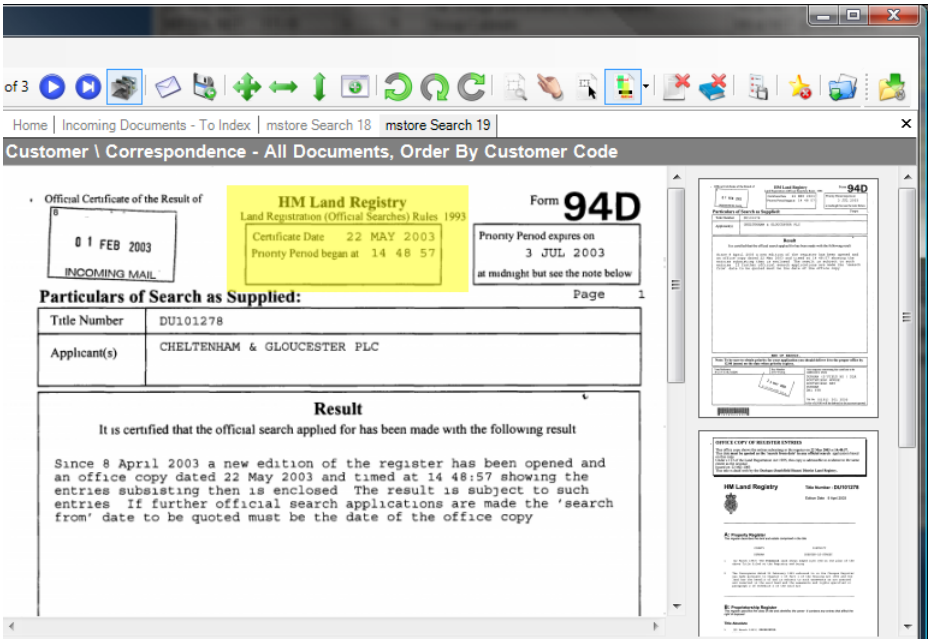

Home | Incoming Documents - To Index | mstore Search 18 | mstore Search 19
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
HM Land Registry
Land Registration (Official Searches) Rules 1993
Certificate Date 22 MAY 2003
Priority Period began at 14 48 57
Form 94D
Priority Period expires on
3 JUL 2003
at midnight but see the note below
Particulars of Search as Supplied:
Page 1
Title Number
DU101278
Applicant(s)
CHELTENHAM & GLOUCESTER PLC
Result
It is certified that the official search applied for has been made with the following result
Since 8 April 2003 a new edition of the register has been opened and an office copy dated 22 May 2003 and timed at 14 48:57 showing the entries subsisting then is enclosed The result is subject to such entries If further official search applications are made the 'search from' date to be quoted must be the date of the office copy

Figure 85

Click and hold the left mouse button and drag out an area on the document where you would like the highlight annotation to be created (Figure 85). Release the mouse button to create the annotation. At this point the 'Select Annotation' tool will be automatically enabled allowing you to fine-tune the position and size of your annotation (see next chapter for more information).

By default mstore will automatically revert back to the Select Annotation tool once the annotation is created. If you hold down the CTRL key as you 'draw' the annotation, mstore will keep the current annotation tool active, rather than reverting back to the selection tool. This allows you to create multiple instances of the same annotation without going backwards and forward to the toolbar.

5.4 Using the 'Note' Annotation

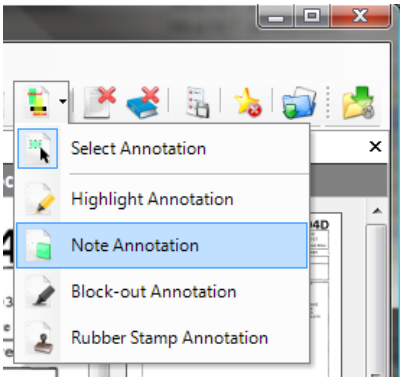


Figure 86

The note annotation (Figure 86) works in the same way as the highlight annotation. The difference between the two is that the note annotation has the ability to have text embedded within it instead of just being used to cover areas of the document.

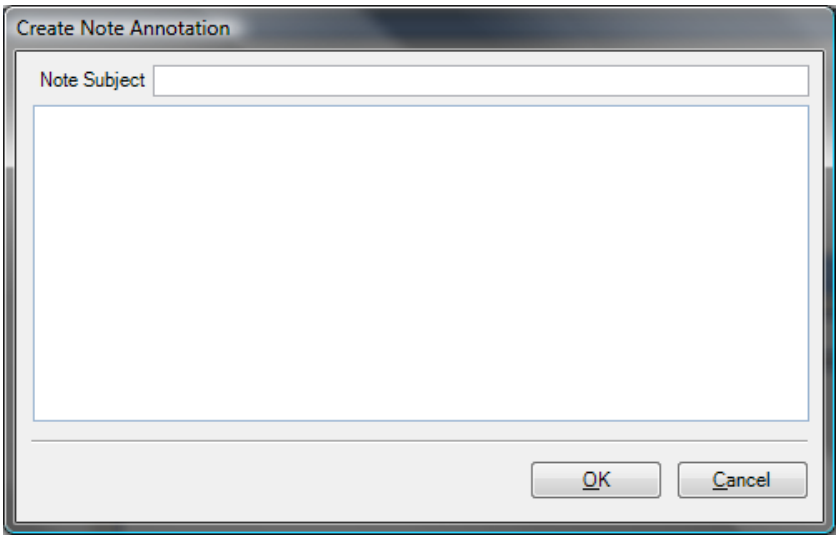


Figure 87

When you add a note annotation to a document you will see the ‘Create Note Annotation’ dialog appear (Figure 87).

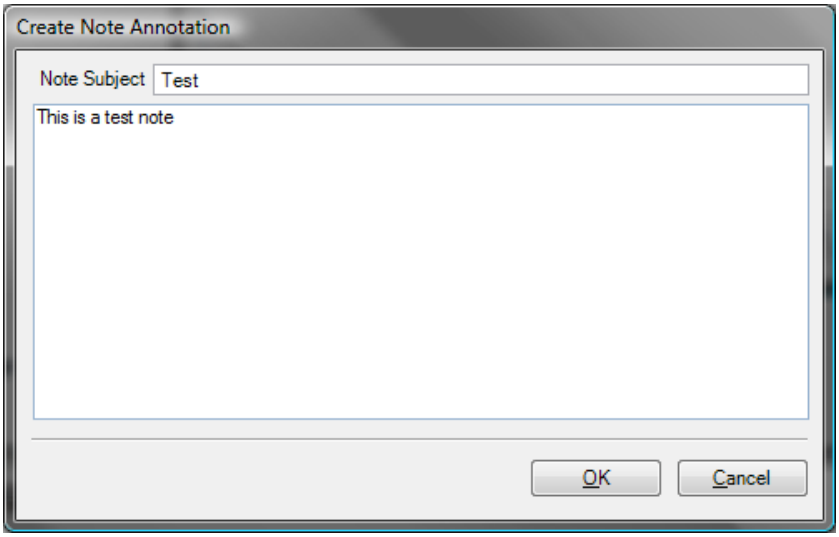


Figure 88

Enter the details and subject of the note and click ‘OK’ to create it (Figure 88 & Figure 89).

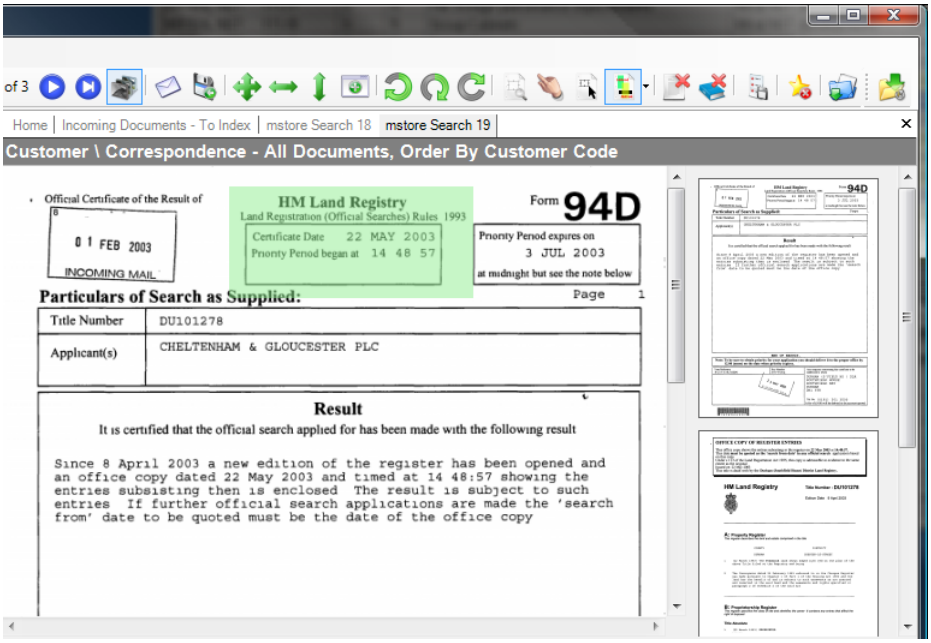

Home | Incoming Documents - To Index | mstore Search 18 | mstore Search 19
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
HM Land Registry
Land Registration (Official Searches) Rules 1993
Certificate Date 22 MAY 2003
Priority Period began at 14 48 57
Form 94D
Priority Period expires on
3 JUL 2003
at midnight but see the note below
Particulars of Search as Supplied:
Page 1
Title Number
DU101278
Applicant(s)
CHELTENHAM & GLOUCESTER PLC
Result
It is certified that the official search applied for has been made with the following result
Since 8 April 2003 a new edition of the register has been opened and an office copy dated 22 May 2003 and timed at 14 48:57 showing the entries subsisting then is enclosed The result is subject to such entries If further official search applications are made the 'search from' date to be quoted must be the date of the office copy

Figure 89

When your Note has been created' you will be in ‘Select Annotation’ mode (Figure 89). In this mode you can double click on the note annotation to see the ‘Amend Note Annotation’ dialog (Figure 90). The multiple placement feature is not available for note annotation types.

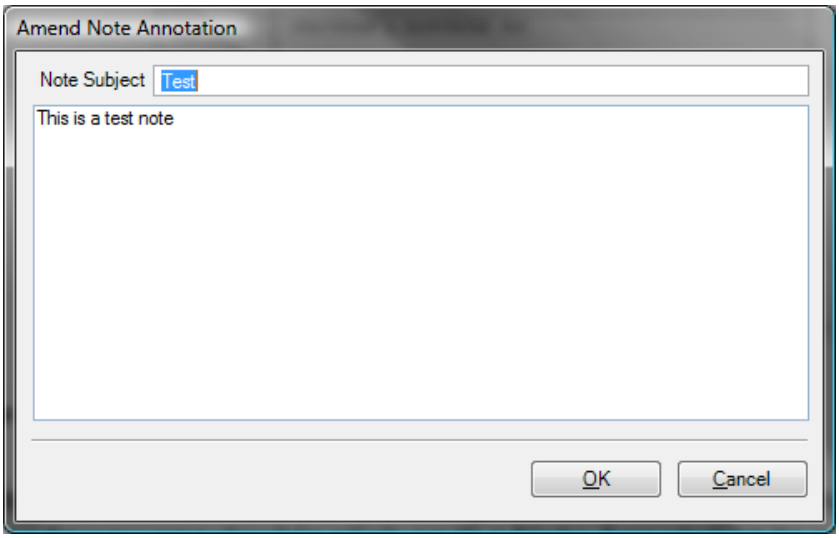


Figure 90

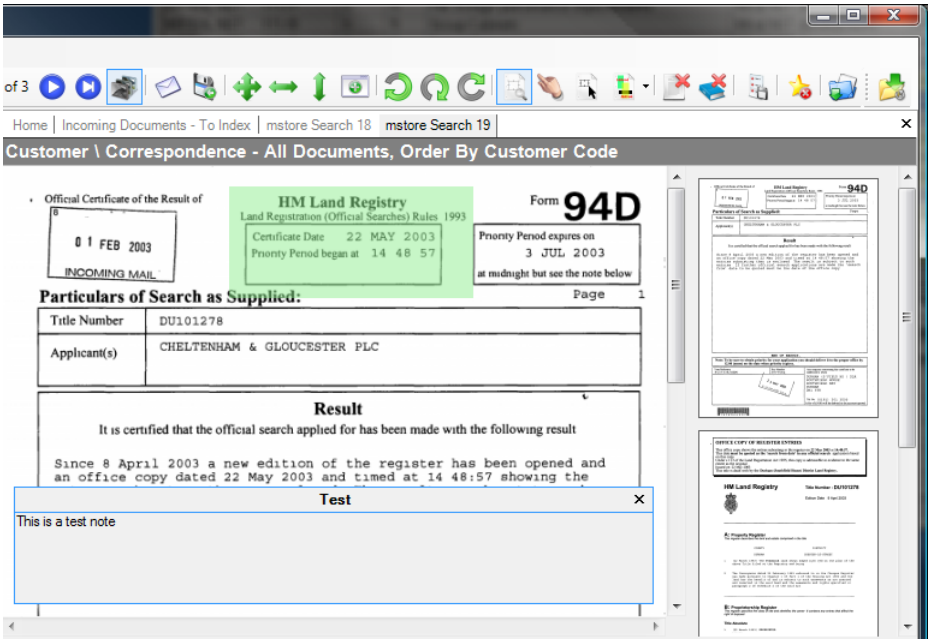

Home | Incoming Documents - To Index | mstore Search 18 | mstore Search 19
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
HM Land Registry
Land Registration (Official Searches) Rules 1993
Certificate Date 22 MAY 2003
Priority Period began at 14 48 57
Form 94D
Priority Period expires on
3 JUL 2003
at midnight but see the note below
Particulars of Search as Supplied:
Page 1
Title Number
DU101278
Applicant(s)
CHELTENHAM & GLOUCESTER PLC
Result
It is certified that the official search applied for has been made with the following result
Since 8 April 2003 a new edition of the register has been opened and
an office copy dated 22 May 2003 and timed at 14 48:57 showing the
Test
This is a test note

Figure 91

If you select any of the other imaging tools ('Select Area', 'Pan' or 'Zoom Area'), hovering over the note on the document will display a popup summary of the note's contents (Figure 91). To close the summary window immediately you can click the 'X' button in its top-right corner. The window will automatically close itself after a few seconds if you move the mouse away from it. Hovering over a note annotation will re-display the summary window.

5.5 Using the 'Block-Out' Annotation

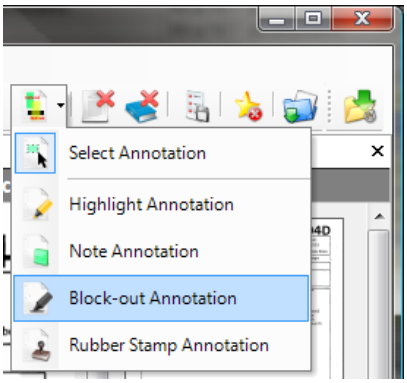


Figure 92

The 'Block-Out' annotation (Figure 92) works in the same way as the Highlight annotation. It is used to hide parts of the document from general view (Figure 93). It does not have any transparency as the highlight and note annotations do. As with the Highlight annotation, if you hold the CTRL key whilst placing the annotation, you can place multiple instances without having to re-select the tool from the toolbar.

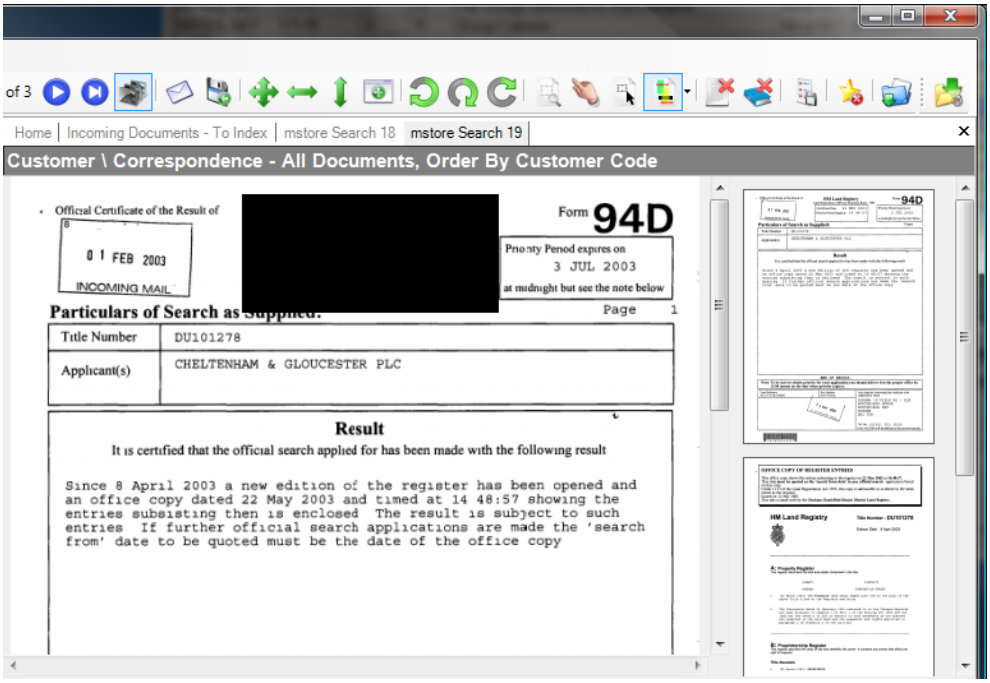

of 3
Home | Incoming Documents - To Index | mstore Search 18 | mstore Search 19
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
Form 94D
Priority Period expires on
3 JUL 2003
at midnight but see the note below
Page 1
Particulars of Search as Supplied:
Title Number
DU101278
Applicant(s)
CHELTENHAM & GLOUCESTER PLC
Result
It is certified that the official search applied for has been made with the following result
Since 8 April 2003 a new edition of the register has been opened and an office copy dated 22 May 2003 and timed at 14 48:57 showing the entries subsisting then is enclosed The result is subject to such entries If further official search applications are made the 'search from' date to be quoted must be the date of the office copy

Figure 93

5.6 Using the 'Rubber Stamp' Annotation

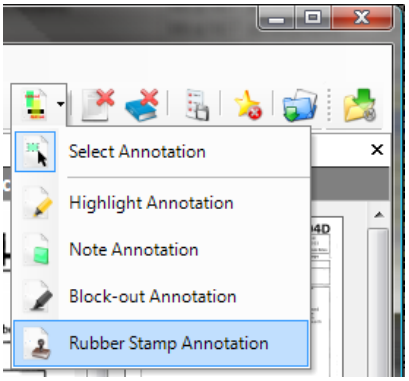


Figure 94

The rubber stamp annotation differs from the other annotation types because it cannot be resized. To create a rubber stamp annotation you need to select 'Rubber Stamp Annotation' from the drop down menu, and then click a point on the document. The rubber stamp will be placed centrally at the point where you have clicked. You will then be presented with a dialog allowing you to configure the text that is to appear on the rubber stamp (Figure 95).

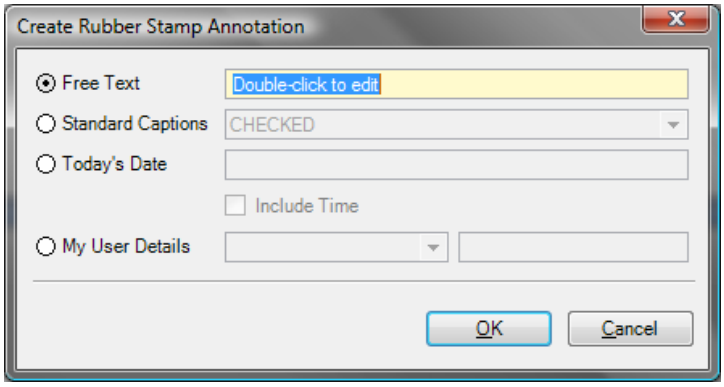


Figure 95

In the dialog you will have 4 options which are explained in detail below.

5.6.1 Free Text

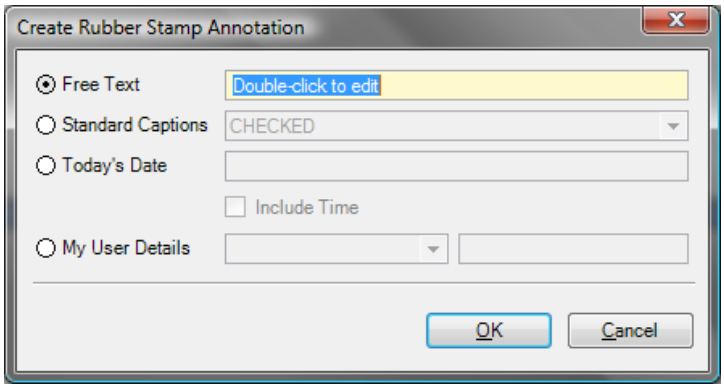


Figure 96

With this option you can type any text to be used as the stamp.

5.6.2 Standard Captions

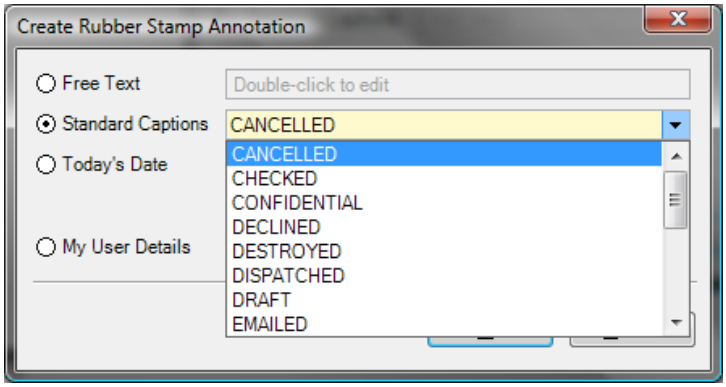


Figure 97

If you select the drop down you can choose from a list of standard rubber stamp captions.

- CANCELLED
- CHECKED
- CONFIDENTIAL
- DECLINED
- DESTROYED
- DISPATCHED
- DRAFT
- EMAILED
- FAXED
- IMPORTANT
- INDEXED
- INVOICED
- POSTED
- PRINTED
- RECEIVED
- SCANNED
- SENT
- URGENT

5.6.3 Today's Date

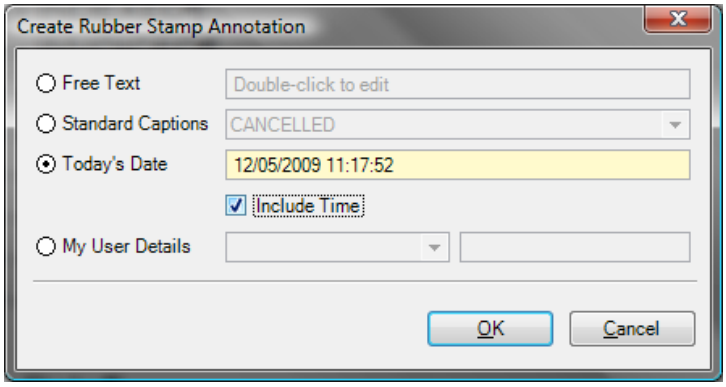


Figure 98

'Today's Date' will tell the rubber stamp annotation to display the current date at the point of creation. The option 'Include Time' will also append the current time to the end of the date.

NOTE
The date and time used on the rubber stamp is a fixed point in time (i.e. the date/time when the annotation was physically added to the document). It does not automatically update to display the current date and time!

5.6.4 My User Details

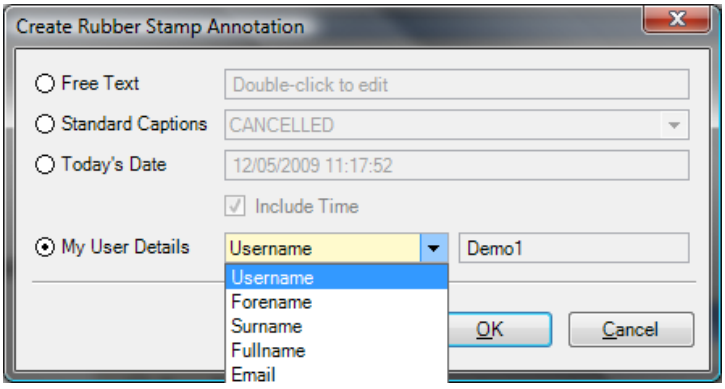


Figure 99

If you select the drop down you can choose from a list of user details to use as the stamp. The box to the right shows the actual value of the user detail selected.

- Username
- Forename
- Surname
- Fullname
- Email

5.6.5 Creating the stamp

Click ‘OK’ to create the rubber stamp.

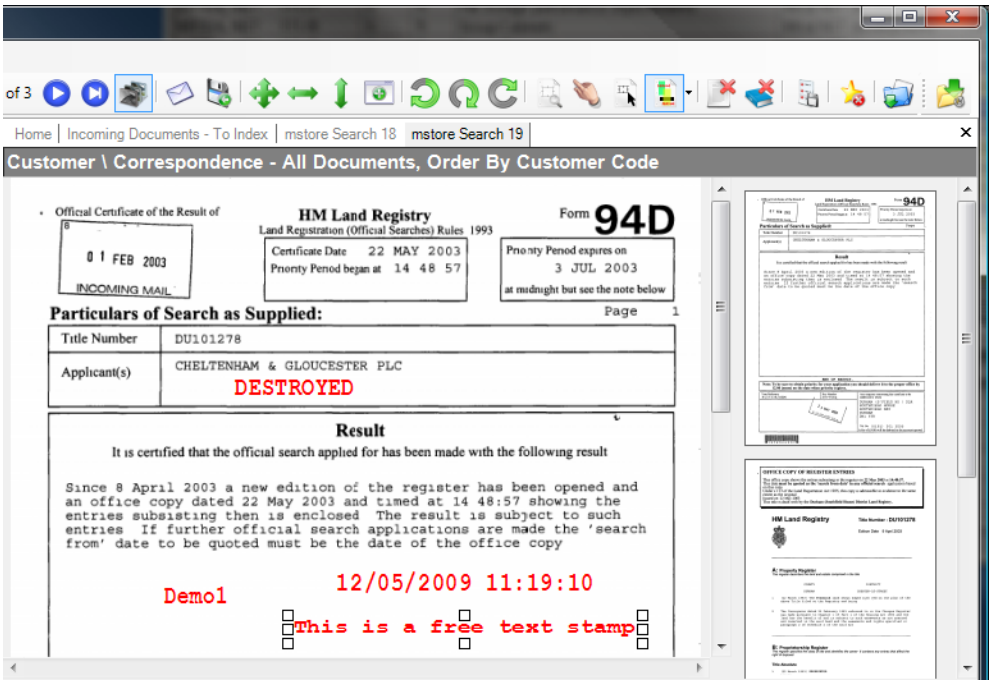
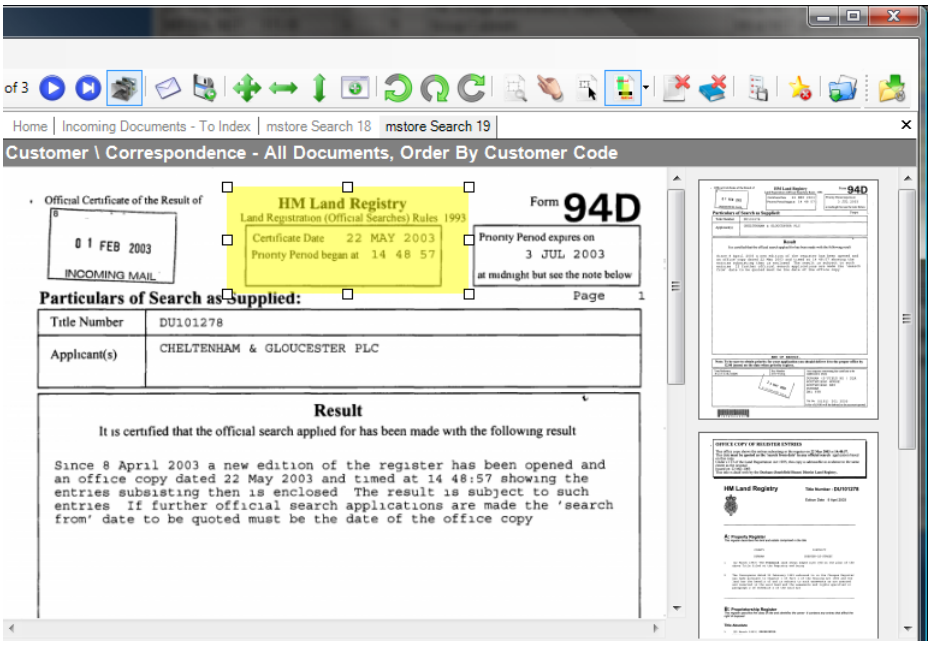

Home | Incoming Documents - To Index | mstore Search 18 | mstore Search 19
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
HM Land Registry
Land Registration (Official Searches) Rules 1993
Form 94D
Certificate Date 22 MAY 2003
Priority Period began at 14 48 57
Priority Period expires on 3 JUL 2003
at midnight but see the note below
Particulars of Search as Supplied:
Page 1
Title Number DU101278
Applicant(s) CHELTENHAM & GLOUCESTER PLC
DESTROYED
Result
It is certified that the official search applied for has been made with the following result
Since 8 April 2003 a new edition of the register has been opened and an office copy dated 22 May 2003 and timed at 14 48:57 showing the entries subsisting then is enclosed The result is subject to such entries If further official search applications are made the 'search from' date to be quoted must be the date of the office copy
Demo1
12/05/2009 11:19:10
This is a free text stamp

Figure 100

If you pick ‘Select Annotation’ from the annotation menu, you can edit the rubber stamp text by double clicking on the annotation. You will also be able to move or delete the rubber stamp annotation.

NOTE
Rubber stamp annotations cannot be resized, even though they display resizing ‘grab handles’ as in Figure 100. Also the multiple placement feature is not available for rubber stamp annotations.

5.7 Moving and Resizing Annotations


Home | Incoming Documents - To Index | mstore Search 18 | mstore Search 19
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
HM Land Registry
Land Registration (Official Searches) Rules 1993
Certificate Date 22 MAY 2003
Priority Period began at 14 48 57
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3 JUL 2003
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Particulars of Search as Supplied:
Page 1
Title Number
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Result
It is certified that the official search applied for has been made with the following result
Since 8 April 2003 a new edition of the register has been opened and an office copy dated 22 May 2003 and timed at 14 48:57 showing the entries subsisting then is enclosed The result is subject to such entries If further official search applications are made the 'search from' date to be quoted must be the date of the office copy

Figure 101

Annotations can be amended after creation by using the ‘Select Annotation’ tool. This allows you to change the size of the annotation (with the exception of rubber stamps), and its position on the document.

If you have just created an annotation on a document, the ‘Select Annotation’ tool will automatically be selected for you. If you are wanting to amend an existing annotation, you will need to drop down the annotation button on the toolbar, and pick ‘Select Annotation’ from the list (Figure 83).

Once you have selected the tool, click on an annotation on the document. You will see 8 small squares, or ‘grab handles’ appear; these handles are used to change the size of the annotation. To change the size of an annotation simply drag these squares to change the size of the annotation in that direction (e.g. Dragging the top-middle or bottom-middle handles will allow you to change the height).

To move an annotation simply click anywhere within the annotation and drag it around the screen.

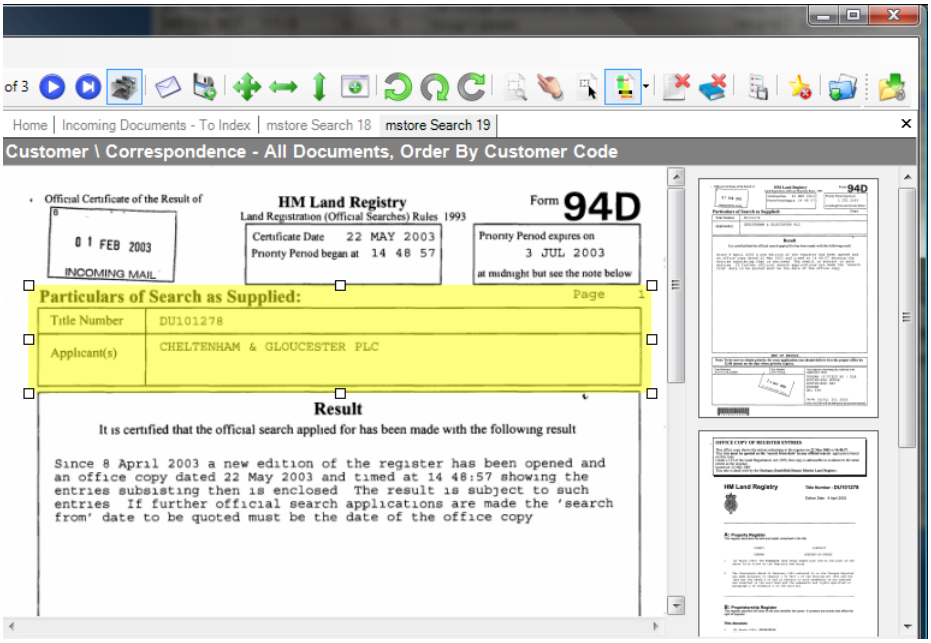
Home | Incoming Documents - To Index | mstore Search 18 | mstore Search 19
Customer \ Correspondence - All Documents, Order By Customer Code
Official Certificate of the Result of
01 FEB 2003
INCOMING MAIL
HM Land Registry
Land Registration (Official Searches) Rules 1993
Form 94D
Certificate Date 22 MAY 2003
Priority Period began at 14 48 57
Priority Period expires on
3 JUL 2003
at midnight but see the note below
Particulars of Search as Supplied:
Page
Title Number
DU101278
Applicant(s)
CHELTENHAM & GLOUCESTER PLC
Result
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Figure 102

5.8 Deleting Annotations

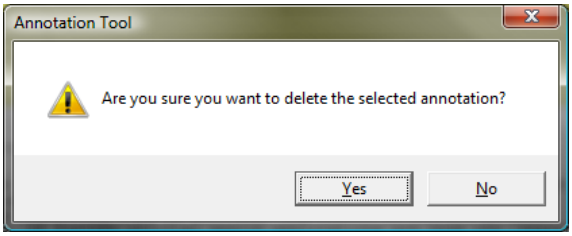

Figure 103

To delete an annotation and permanently remove it from the document, you must first select the annotation which is to be deleted. Click the annotation button to select the 'Select Annotation' tool and then click once on the annotation that is to be removed.

With the annotation selected (it should have the 8 grab handles around it), press the 'DEL' key on the keyboard. The message box in Figure 103 will be displayed, prompting you for confirmation that the annotation is to be removed. Clicking 'Yes' will permanently remove the selected annotation.

6 Using ‘My mstore’

6.1 What’s in this chapter

‘My mstore’ is a feature within mstore which is personalized to the user with all the content accessible being related to the user in some way. It is also the main way of quickly accessing content in the various additional modules within mstore.

Through ‘My mstore’ you can quickly access:-

- Your **Checked-Out** Documents
- Documents you have marked as **Favourites**
- **Incoming Documents** that you are yet to index
- Your most **Recent Searches**
- **Saved Searches** which you have saved or have been saved for a role which you belong to
- **Tasks** which have either been assigned to you or are owned by you
- **Right click** on ‘My mstore’ modules to use their functionality without opening the module

This chapter will explain:-

- How to access ‘My mstore’
- What To Do If Items Are Missing From ‘My mstore’
- How To Use ‘My mstore’
- How Items Are Added To ‘My mstore’
    - Checked-Out Documents
    - Favourites
    - Incoming Documents
        - My Incoming Documents
    - Recent Searches
    - Saved Searches
    - Tasks
        - Assigned To Me
        - Owned By Me
    - ‘My mstore’ shortcuts
        - Checked-Out Documents
        - Favourites
        - Recent Searches
        - Saved Searches

6.2 How to access ‘My mstore’

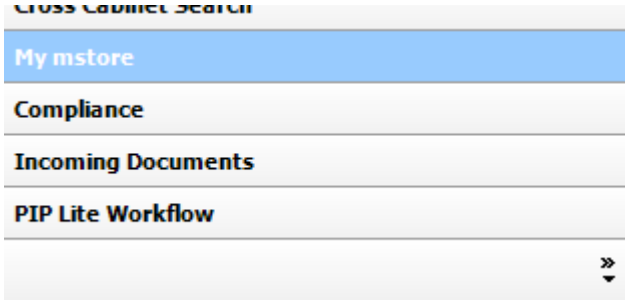

Figure 104

To access ‘My mstore’ select ‘My mstore’ from the items list in the **Listbar** (Figure 104). You will see Figure 104. You should then see Figure 105.

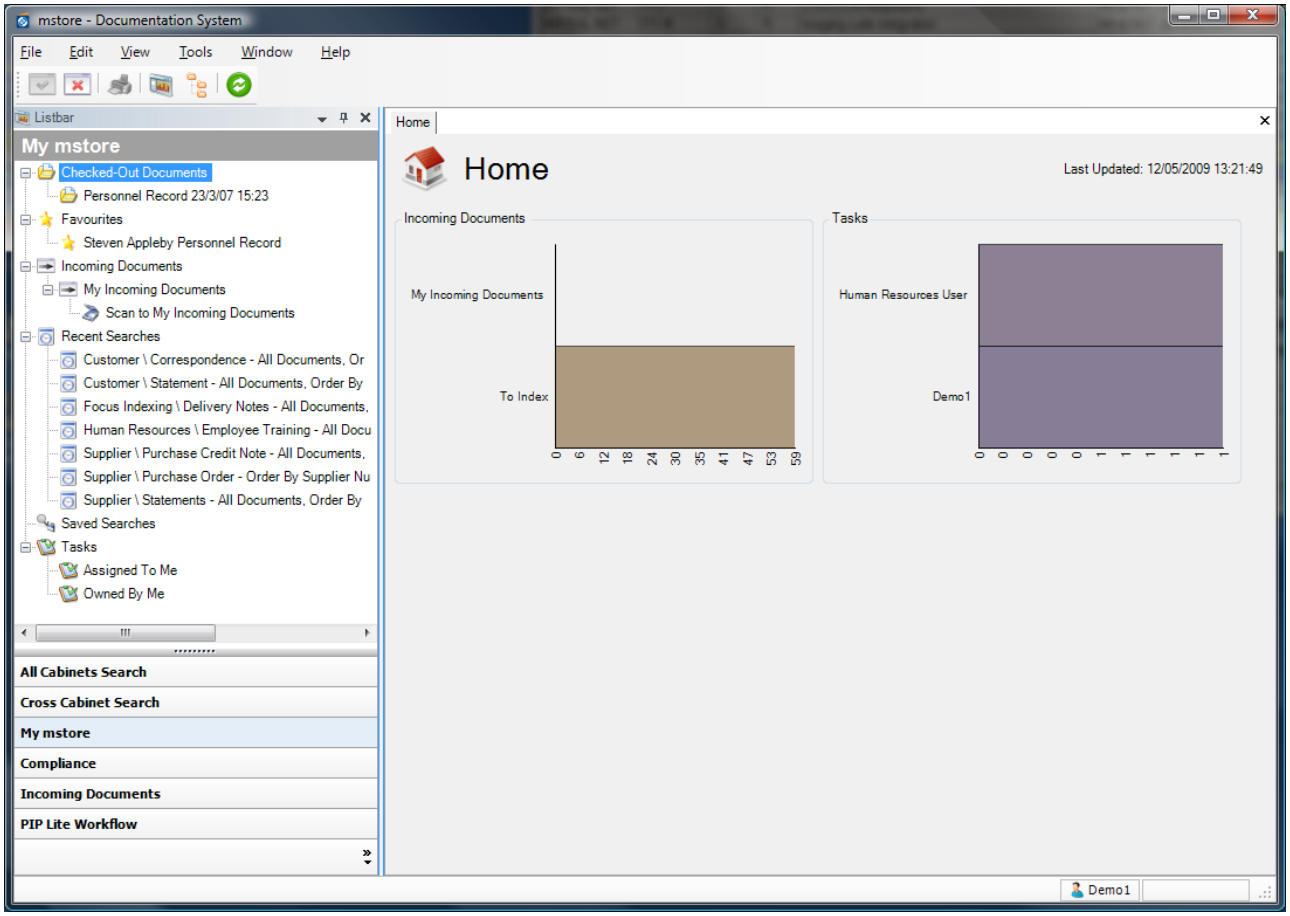

Figure 105

6.3 What To Do If Items Are Missing From ‘My mstore’

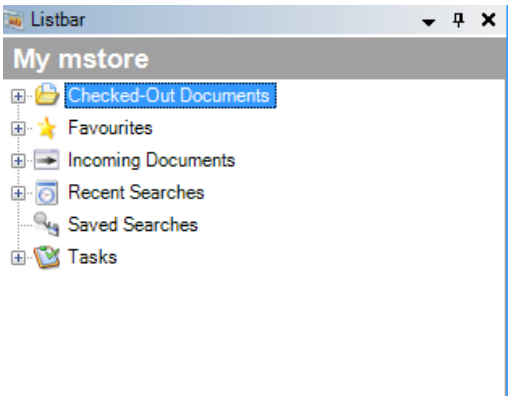

Figure 106

If you can’t see all the modules shown in Figure 106 then this is because your systems administrator has not given you the permission to access the missing modules. Contact your systems administrator to find out why.

6.4 How To Use ‘My mstore’

Each item in Figure 106 contains a list of links to documents or to the main module. By expanding the list (clicking on the + to the left of the icon) you can view the items and then click on them to open them in a new tab.

Under **Incoming Documents**, the **‘My Incoming Documents’** item takes you to your own personal **Incoming Documents**.

Under **Tasks**, the items '**Assigned To Me'** and '**Owned By Me'** open up a tasks tab showing a list of those tasks.

6.5 How Items Are Added To ‘My mstore’

6.5.1 Checked-Out Documents

Whenever you check a document out it will be added to this list to remind you. Clicking on the item will open the document with the versions tab displayed. Undoing the checkout or checking the document back in will remove it from this list

6.5.2 Favourites

By clicking on the favourite’s button in the document toolbar the document will be added to the favourites list, re-clicking will remove it from the list. Click on the document in the favourites list to open it in a new tab.

6.5.3 Incoming Documents

6.5.3.1 My Incoming Documents

My Incoming Documents takes you to your own personal Incoming Documents. Here you can import documents that only you can see and index.

6.5.4 Recent Searches

This lists the last 10 searches performed in previous sessions plus any search in your current session, they are ordered by name. Clicking on an item in this list will perform the search again.

6.5.5 Saved Searches

When searching you can save your search and it will appear here. Clicking on an item in this list will perform a search with the same criteria.

6.5.6 Tasks

Tasks are created within a document; after they have been created they can be viewed and altered in the tasks module.

6.5.6.1 Assigned To Me

This will open a tasks tab listing all the tasks that people have assigned to you.

6.5.6.2 Owned By Me

This will open a tasks tab listing all the tasks that you have created.

6.6 'My mstore' shortcuts

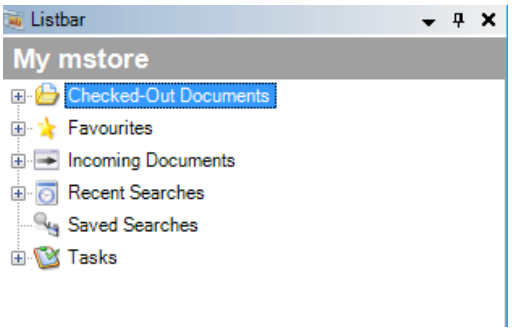

Figure 107

In the 'My mstore' tree (Figure 107) you can right click on certain items to get a menu allowing you to access the functionality within them.

6.6.1 Checked-Out Documents

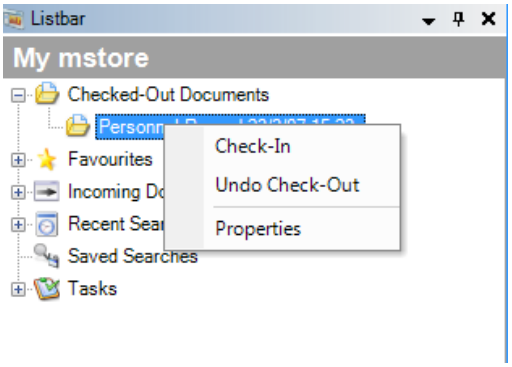

Figure 108

The documents listed below the Checked-Out Documents node can be right clicked to show the menu above (Figure 108). From here you can quickly access the **Check-In** or **Undo Check-Out** functionality from within the module.

Clicking these will pop up the corresponding window as described earlier in the Viewing Documents and Actions chapter.

6.6.2 Favourites

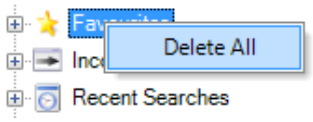

Figure 109

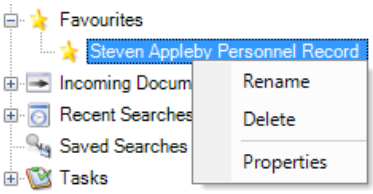

Figure 110

The documents listed below the Favourites node can be right clicked to show the menu above (Figure 110). From here you can rename or delete the Favourite.

Right clicking on the Favourites node gives you the option to **Delete All** of the Favourites at once (Figure 109).

6.6.3 Recent Searches

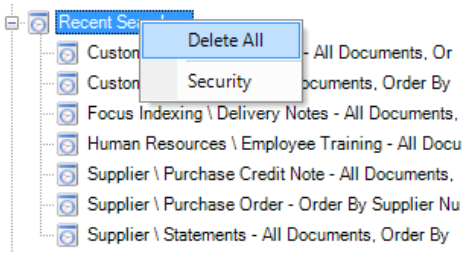
Delete All
Security
Focus Indexing \ Delivery Notes - All Documents,
Human Resources \ Employee Training - All Docu
Supplier \ Purchase Credit Note - All Documents,
Supplier \ Purchase Order - Order By Supplier Nu
Supplier \ Statements - All Documents, Order By

Figure 111

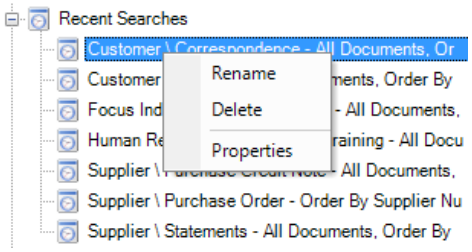

Figure 112

The documents listed below the Recent Searches node can be right clicked to show the menu above (Figure 112). From here you can rename or delete the Recent Search.

Right clicking on the Recent Searches node gives you the option to **Delete All** of the Recent Searches at once (even those not listed) (Figure 111).

6.6.4 Saved Searches

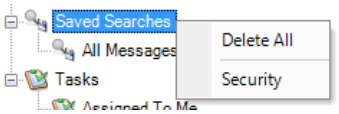

Figure 113

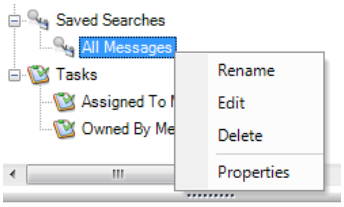

Figure 114

The documents listed below the Saved Searches node can be right clicked to show the menu above (Figure 114). From here you can rename or delete the Saved Search. You can also edit a Saved Search; this loads the search into the Listbar allowing you to edit the search which you can then change. Click **'Save'** to confirm the edit (Figure 115).

Right clicking on the Saved Searches node gives you the option to **Delete All** of your Saved Searches at once (Figure 113).

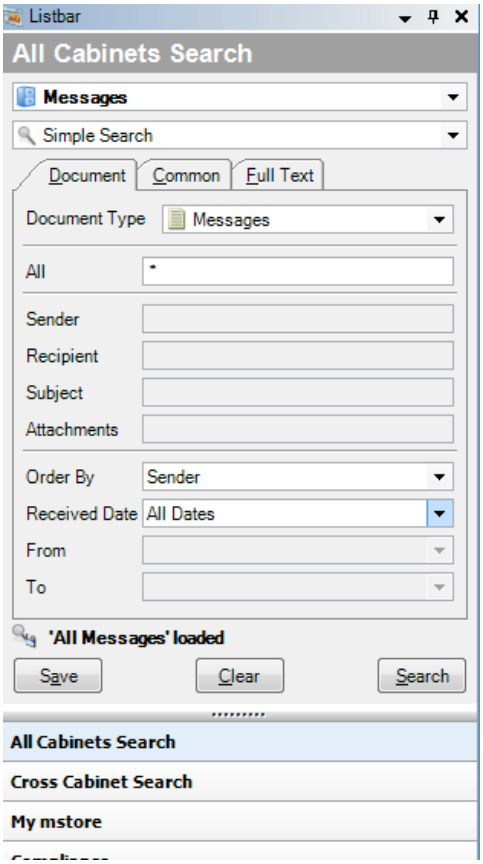

Figure 115

7 Using mstore Tray

7.1 What's in this Chapter

mstore Tray is an additional application outside of mstore to quickly access the functionality within mstore and do much more. mstore Tray has the ability to index e-mails and any type of file on a computer (which it has rights to). You can also use it for "Quick Searchs" and to access tasks.

Within mstore Tray you can,

- Search for documents using a variety of different methods
- Access tasks
- View your My mstore folder in My Documents
- Index emails or just their attachments
- Index open word or excel documents
- Index general documents
- Split TIF or PDF pages on indexing
- Use in conjunction with Primo PDF to render and store any printable file as PDF
- Fully index to a cabinet or place in incoming documents to be indexed later

This chapter will explain,

- Searching For Documents
  - Quick Search
  - Clipboard Searching
  - Manual Searching
  - Code Free Integration Searching
- Accessing tasks from mstore Tray
- Indexing Documents
  - Sending documents to 'My mstore'
    - Indexing to mstore
  - Indexing emails
  - Indexing from Office applications
  - Indexing Using Code Free Integration
- Setting up mstore Tray
  - Default Login
  - Quick Search

7.1.1

- Outlook Indexing
- Other

7.2 Searching For Documents

7.2.1 Quick Search

Another way of searching is mstore **Tray**, which allows you to do quick searches – even when you are working in another application. This can be launched by right clicking on the mstore **Tray** icon, as shown in Figure 116.

Figure 116

With mstore **Tray** (Figure 117) there are two methods of searching, via clipboard or manually.

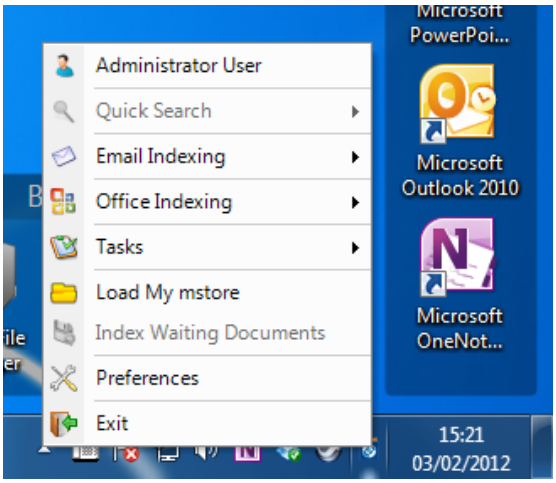

Figure 117

7.2.2 Clipboard Searching

With clipboard searching copy some text and right click on mstore **Tray**.

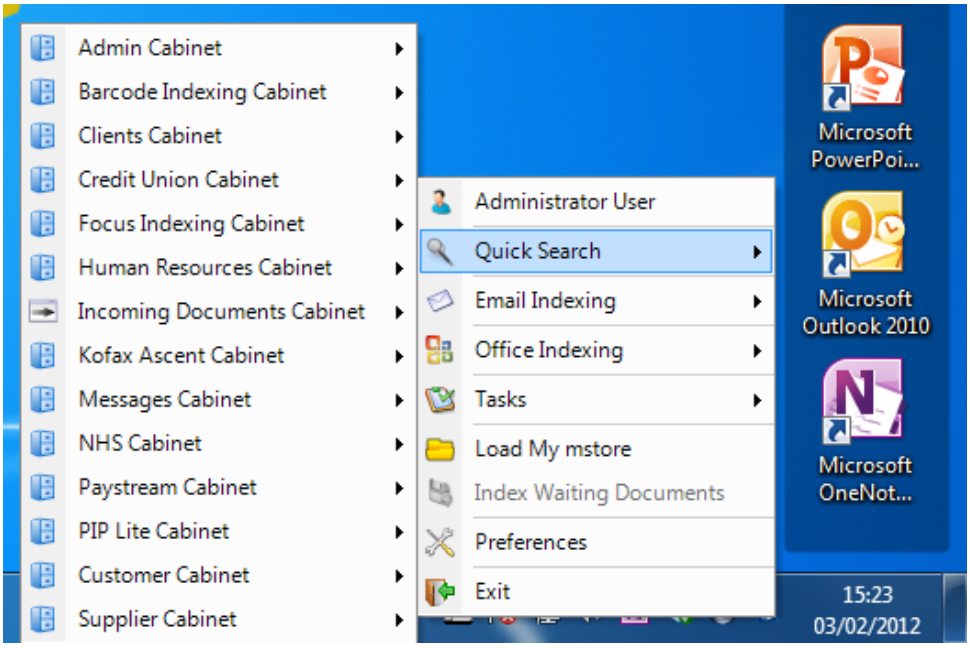

Figure 118

In the menu highlight **Quick Search** (Figure 118).

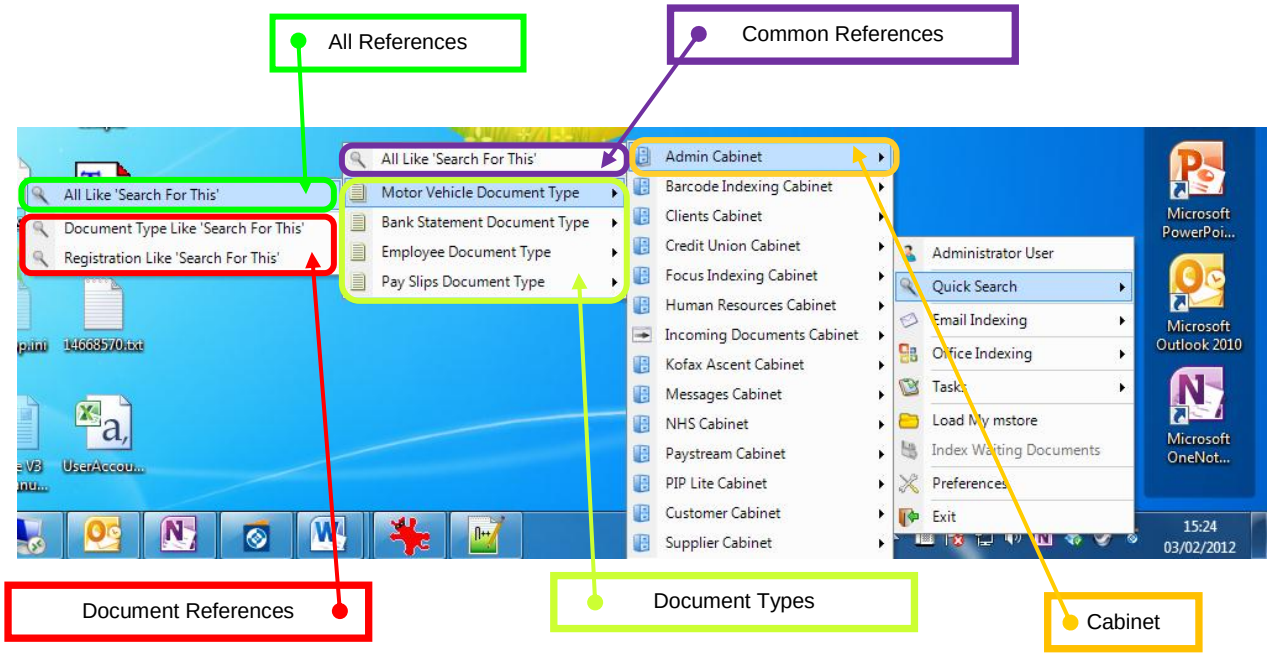

Figure 119

Then move to highlight the cabinet you want to search on (and then optionally document type (Figure 119)). Depending on your mstore **Tray** settings you will either do a like or an equals search of what's in your clipboard.

Select the reference you want to search on or choose to search on all the references.

7.2.3 Manual Searching

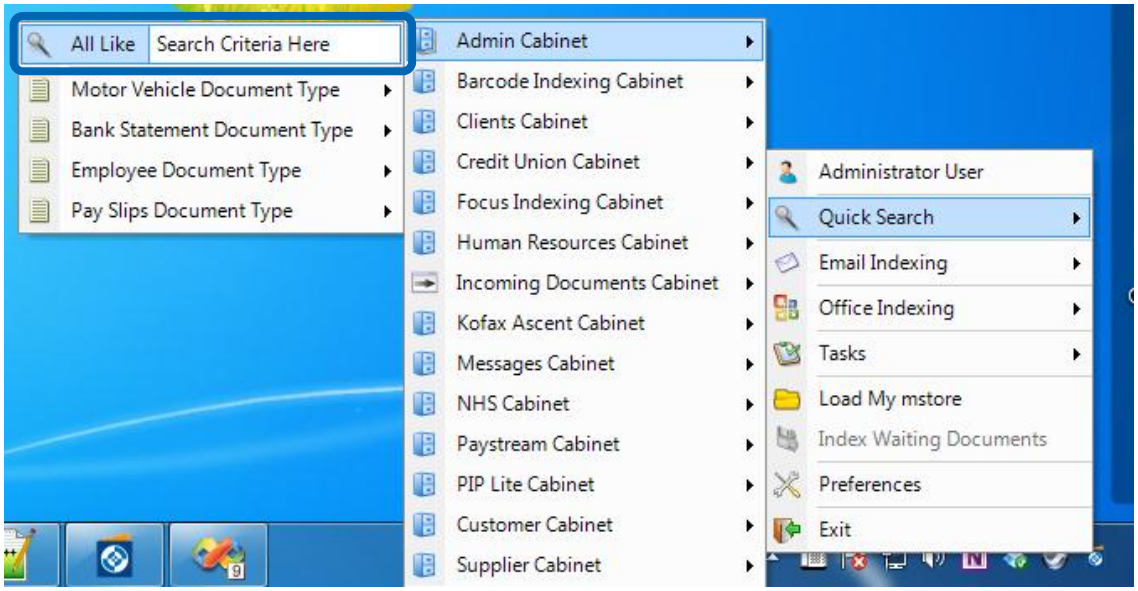

Figure 120

With manual searching you follow the same steps as clipboard searching but you must type the search text in and press enter to search.

7.2.4 Code Free Integration Searching

Depending on how your mstore system is configured and which optional components are installed, you may be able to perform mstore searches using a feature called **Code Free Integration**. This feature of mstore allows values to be acquired from compatible external applications (e.g. Notepad or a bespoke in-house software application), and then mstore can use these values to perform searches and index documents.

If code free integration is configured on your system you should notice an additional item when the mstore Tray menu is displayed (Figure 121).

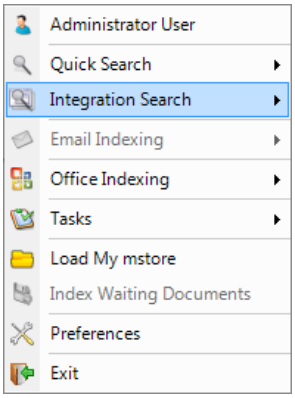

Figure 121

Searching via code free integration requires that the configured application is running alongside mstore Tray, and is displaying the appropriate data for which you want to search. If this isn't the case the **Integration Search** menu in Figure 121 will be ghosted out and unavailable.

If everything is running correctly you can hover over the **Integration Search** menu and a sub-menu will be displayed showing the values that code free integration has managed to acquire. The example in Figure 122 shows that two code free configurations have been defined; one to acquire a Purchase Invoice Number from the host application, and one to acquire a Credit Note Number and Supplier together. The values next to the configuration names (i.e. 654321) are the values which code free has managed to identify in the host application. Clicking on this menu item will perform a search for the value, and the results will then be displayed within mstore (Figure 123) or within a standalone viewing window (Figure 124). This will depend how code free integration has been configured for you.

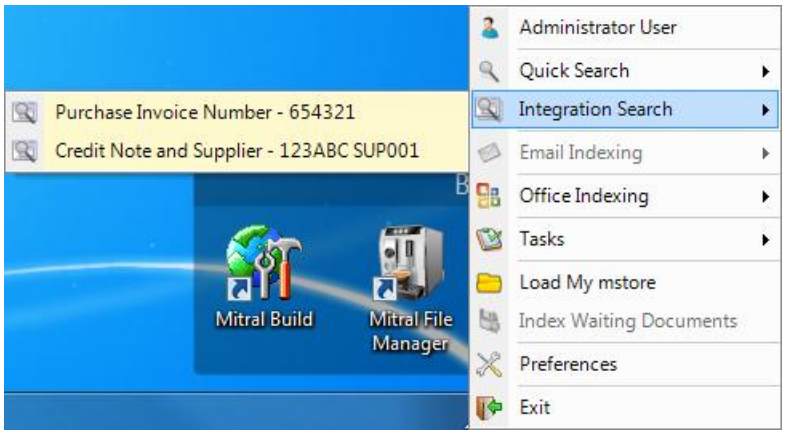

Figure 122

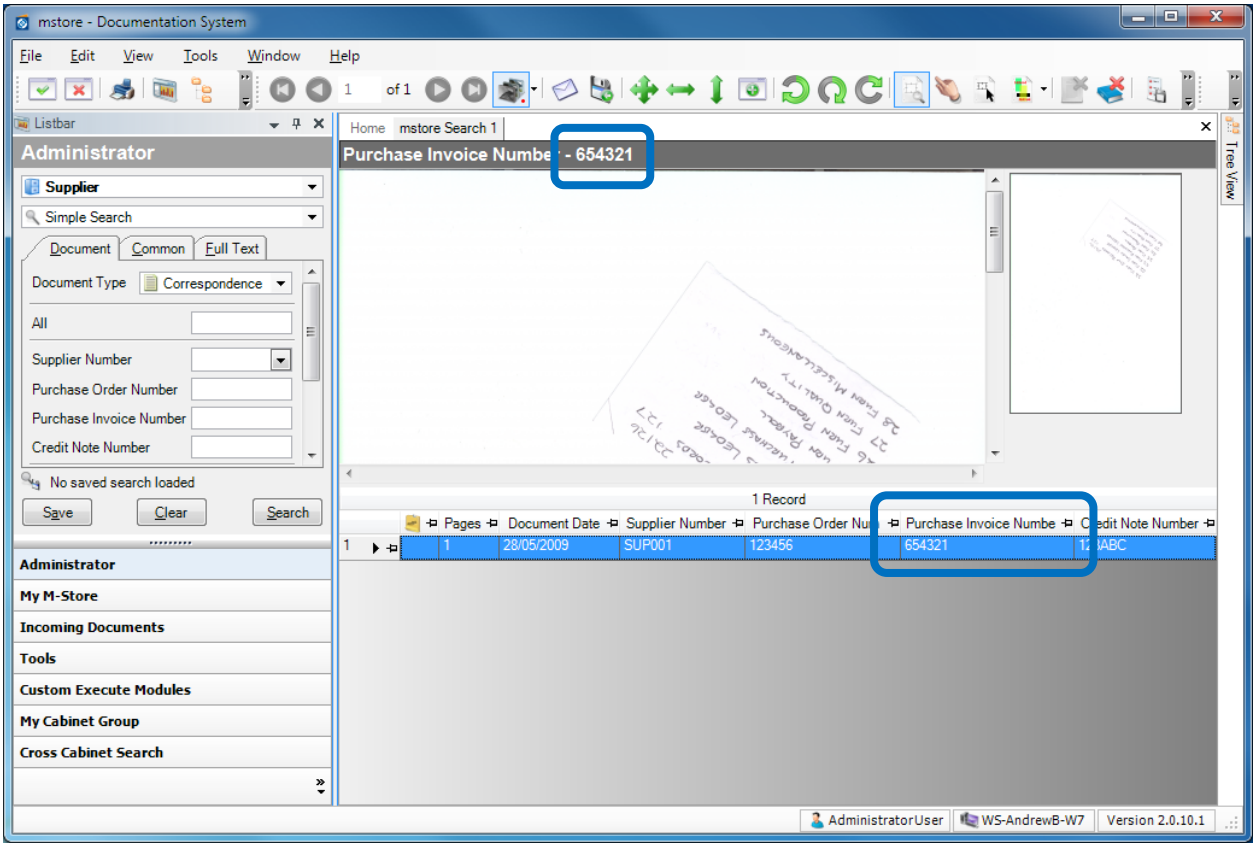
mstore - Documentation System
File Edit View Tools Window Help
Listbar
Administrator
Supplier
Simple Search
Document Common Full Text
Document Type Correspondence
All
Supplier Number
Purchase Order Number
Purchase Invoice Number
Credit Note Number
No saved search loaded
Save Clear Search
Administrator
My M-Store
Incoming Documents
Tools
Custom Execute Modules
My Cabinet Group
Cross Cabinet Search
Home mstore Search 1
Purchase Invoice Numbe - 654321
Tree View
1 Record
Pages Document Date Supplier Number Purchase Order Nu Purchase Invoice Numbe Credit Note Number
1 1 28/05/2009 SUP001 123456 654321 ABC
AdministratorUser
WS-AndrewB-W7
Version 2.0.10.1

Figure 123

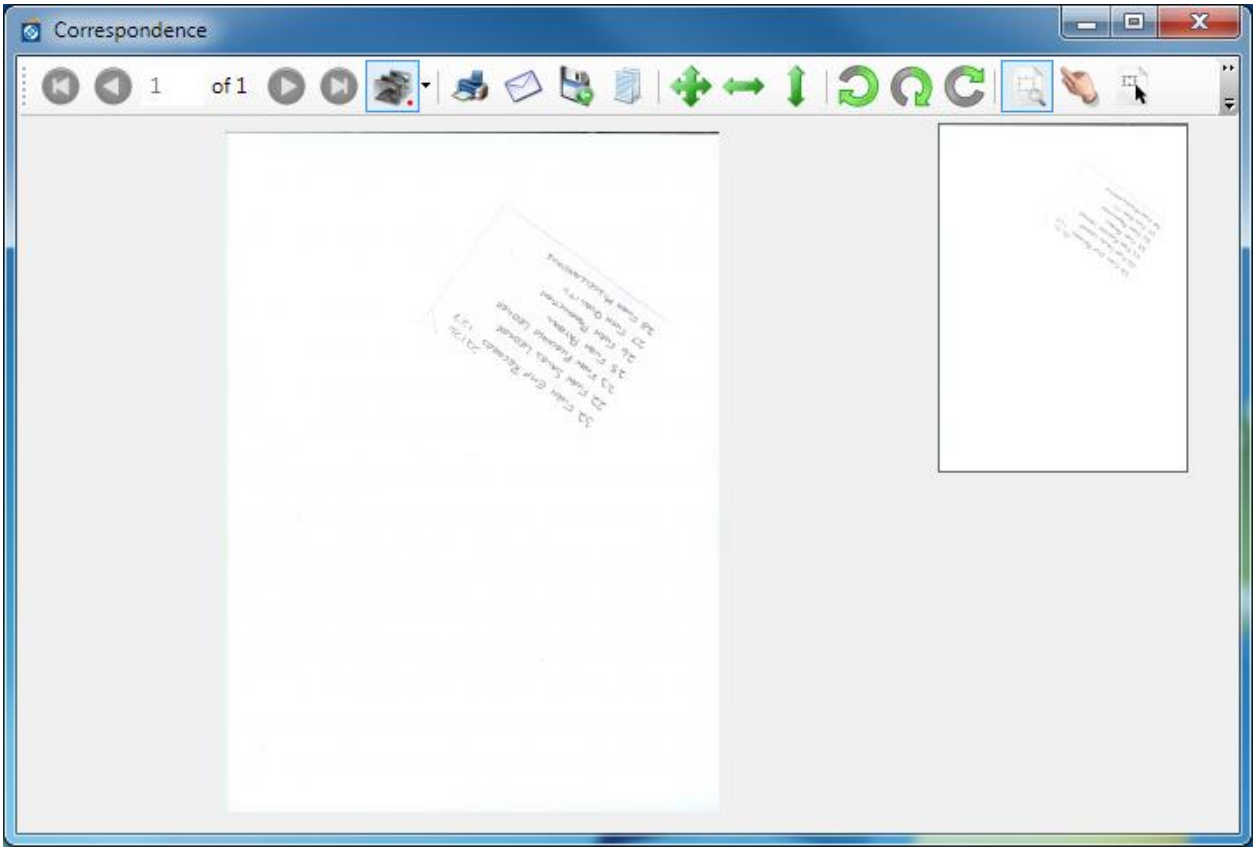

Figure 124

7.3 Accessing tasks from mstore Tray

To access tasks from mstore Tray right click on the Tray icon (Figure 125).

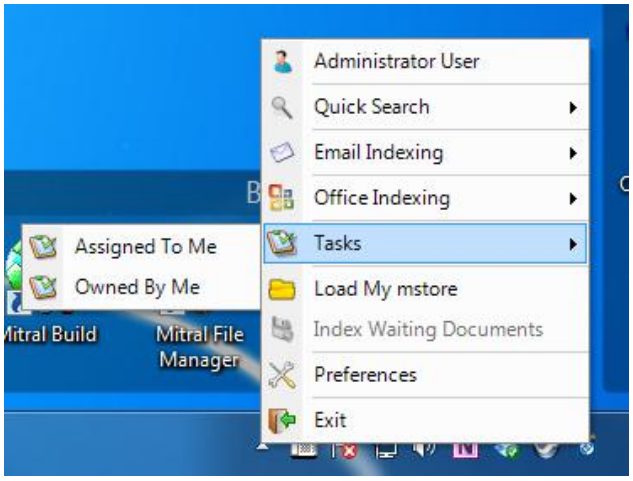

Figure 125

Select either 'Assigned To Me' or 'Owned By Me'. These are the same as the options under 'My mstore' in the main application. This will open mstore with the tasks module loaded.

7.4 Indexing Documents

7.4.1 Sending documents to 'My mstore'

To index with mstore **Tray** find the file you wish to index.

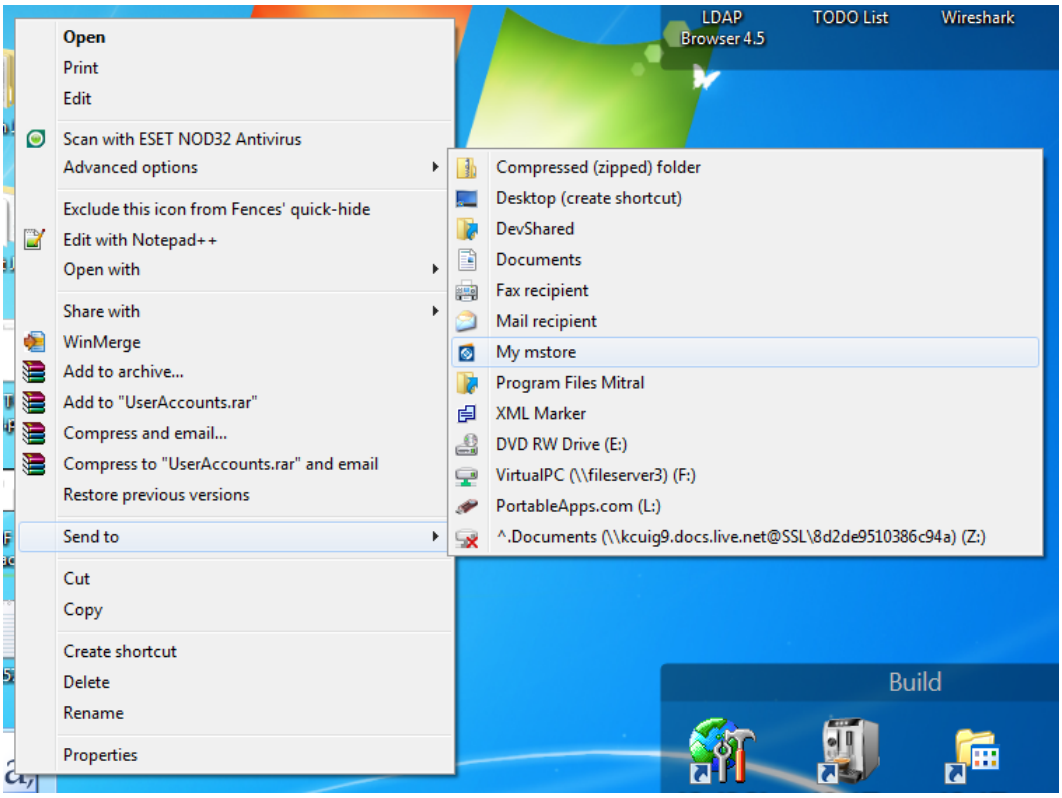

Figure 126

Right click and select **Send To**, then '**My** mstore' (Figure 126).

7.4.1.1 Indexing to **mstore**

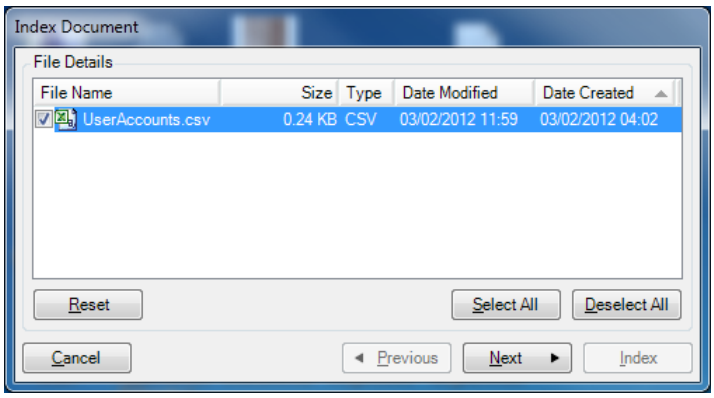

Figure 127

mstore **Index Dialog** will now load and show (and have ticked) the document you have just sent to 'My mstore'. You can select as many items as you like to index together and use **Select All** and **Deselect All**, you can use **Reset** to return back to what was originally selected. Click next to begin indexing.

Figure 128

In Figure 128 you can either select to index to a **Cabinet** or to **Incoming Documents**. By indexing to incoming documents the **Index** button will become enabled and you will be able to index without entering references. This allows you to index quicker but means that the references will have to be filled in later.

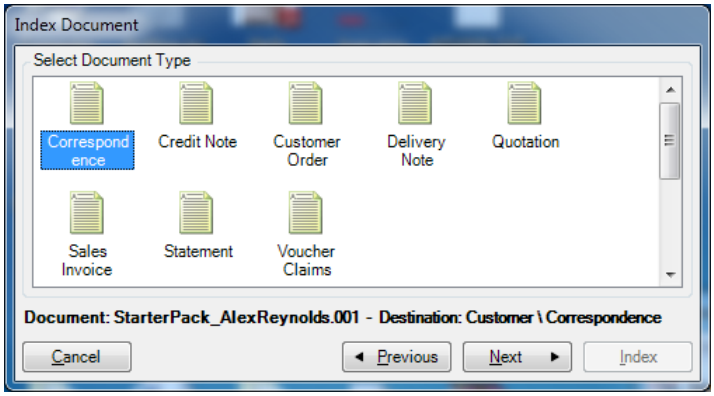

Figure 129

You can right click to choose a different type of view on the cabinets (Figure 130), this helps if you have a lot of cabinets to choose from. You can also do this when selecting the document type further on (Figure 129).

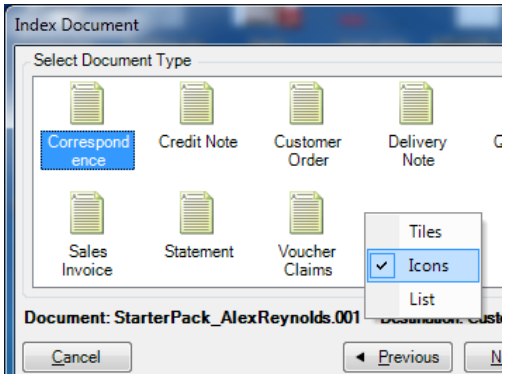

Figure 130

After selecting a cabinet click '**Next**'.

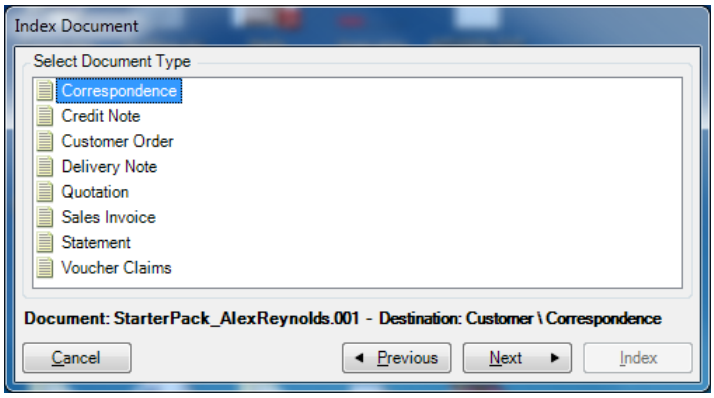

Figure 131

Select a document type (Figure 131) and click '**Next**'. As with the cabinet selection, you can also change the display style of the document types here by right-clicking and picking the display style from the popup menu.

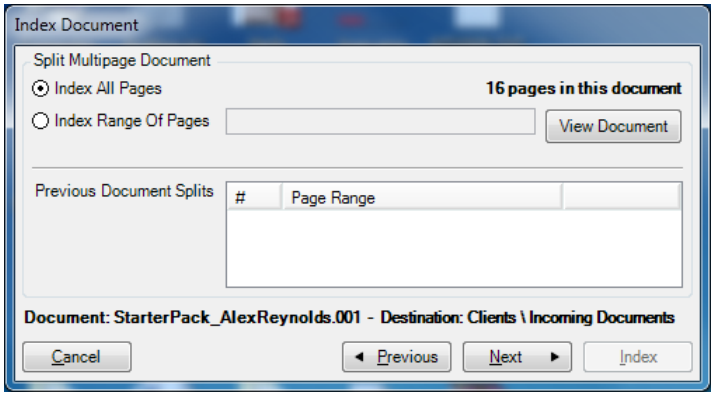

Figure 132

If the document you are indexing is a TIF or PDF file with multiple pages, then you will be given the option to split the pages.

Selecting 'Index Range Of Pages' will allow you to filter out the pages in the same way you would when printing. Clicking 'View Document' allows you to preview your choice.

The Previous Document Splits section shows you the page ranges selected while you have been using the Index Document Dialog.

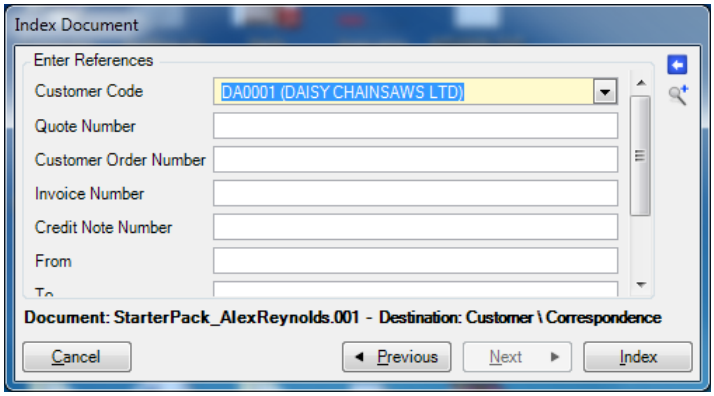

Figure 133

Enter in the references and then click **Index** to index the document (Figure 133).

7.4.2 Indexing emails

Indexing emails is done through mstore **Tray**, to start you must open outlook and highlight an email (Figure 134).

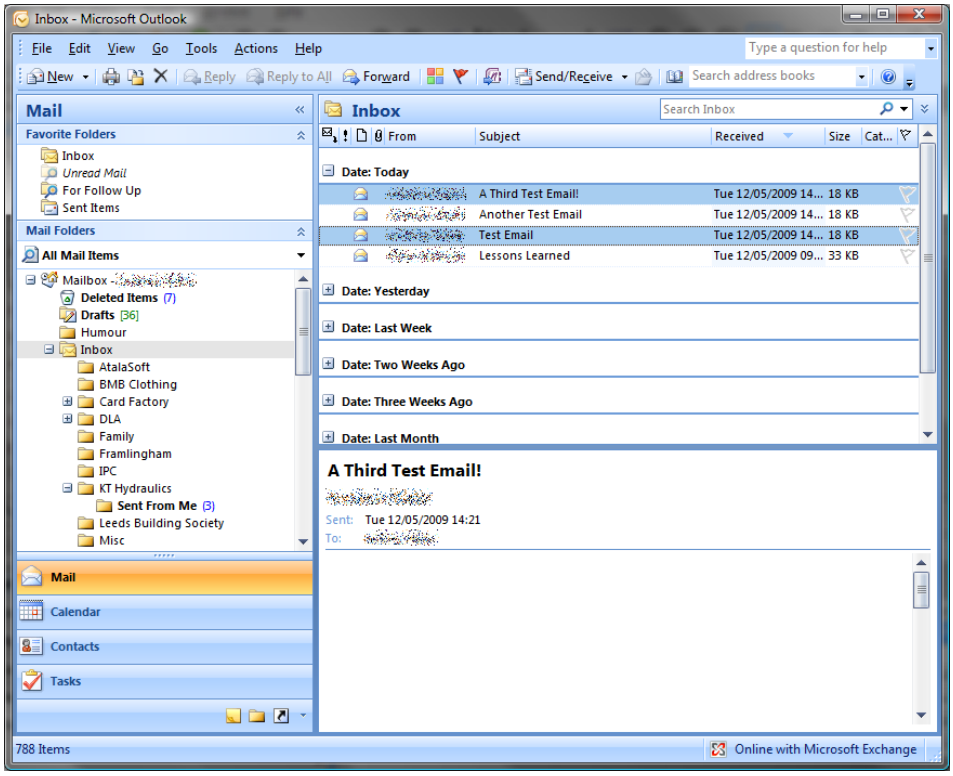

Figure 134

After an email is selected right click on mstore **Tray**, then highlight emails to get a list of options (Figure 135).

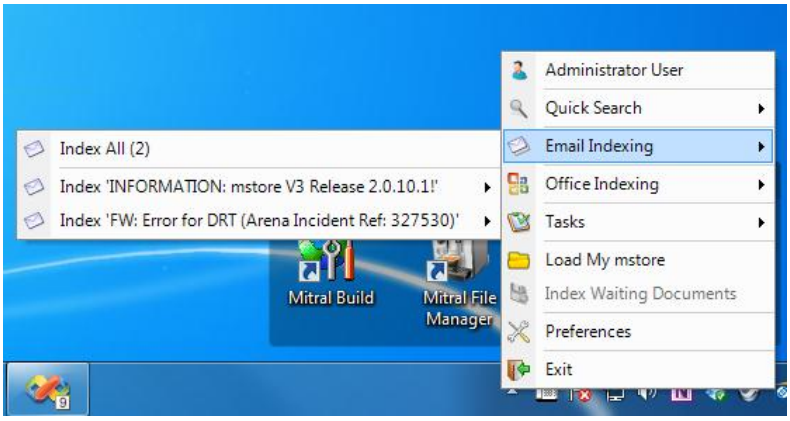

Figure 135

You can either index all the highlighted emails (by selecting the 'Index All (*n*)' item), or just one of them by selecting the email directly from the list.

After selecting the email(s) to index mstore **Tray indexing** will start.

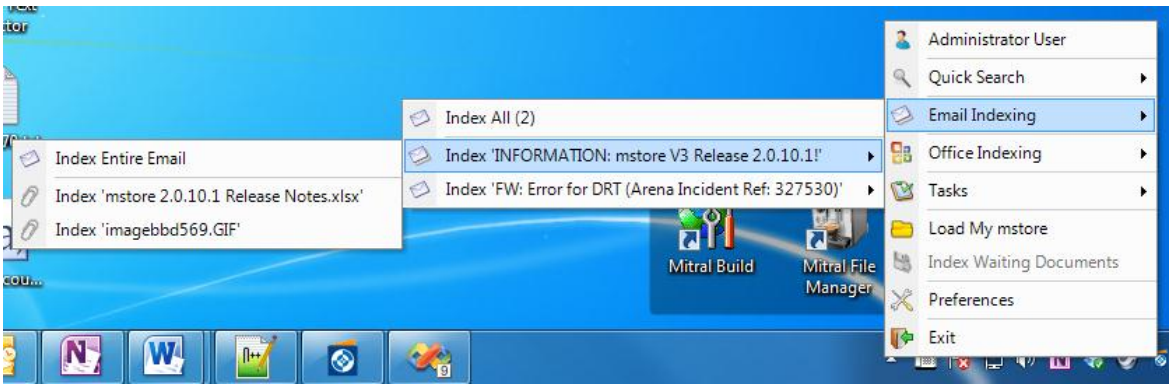

Figure 136

You can also index an e-mail's attachment separately (Figure 136). If the email has an attachment you will be able to hover over the email in mstore Tray, and be offered the option of indexing the entire email or its attachment(s).

7.4.3 Indexing from Office applications

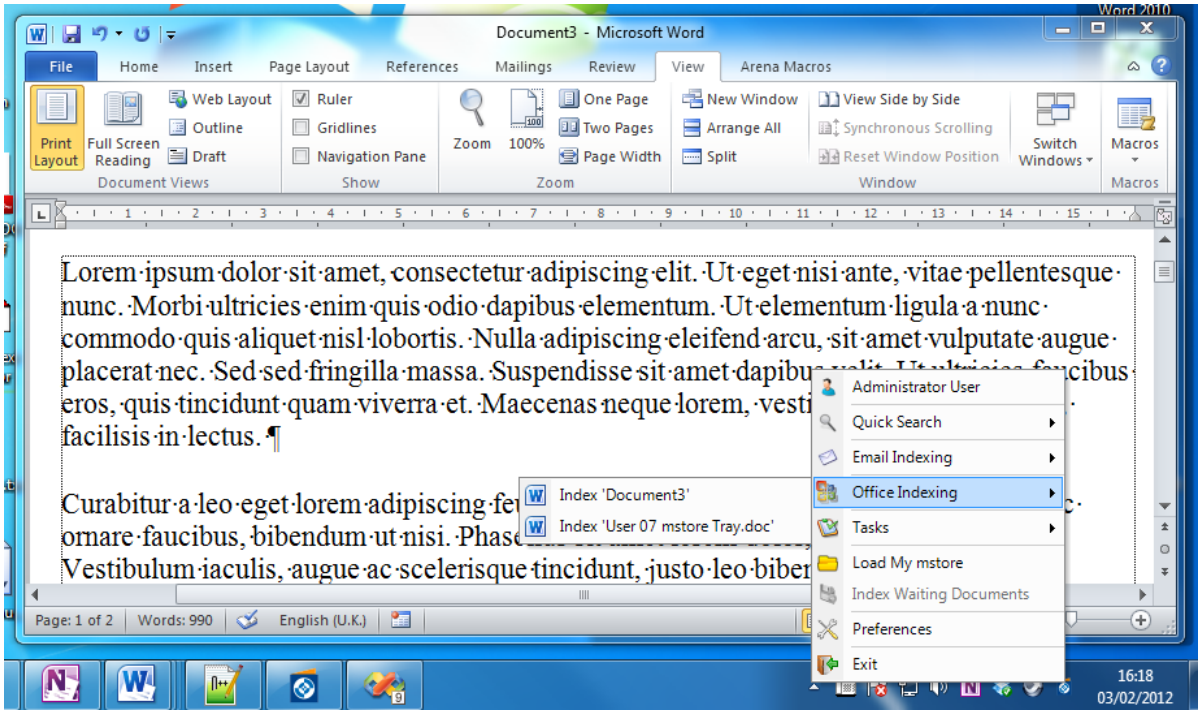

Figure 137

If you have an Office application open (e.g. Word, Excel) then you can index the open document into mstore. If the document has not been saved you will be prompted to save it first. This functionality is only supported by Word and Excel.

To do this right click on mstore Tray and select “Office Indexing”, then select the open document you would like to index (Figure 137). You can then index the document as shown earlier.

7.4.4 Indexing Using Code Free Integration

You can also use **Code Free Integration** to index documents using mstore Tray. How this happens will depend on how the integration functionality has been configured on your mstore system.

In general code free integration will automatically populate references for you when you reach this part of the indexing process. In the example screenshot in Figure 138, mstore has been configured so that the **Credit Note and Supplier** configuration is used to automatically populate these two references when indexing a document. The values have been collected from the host application.

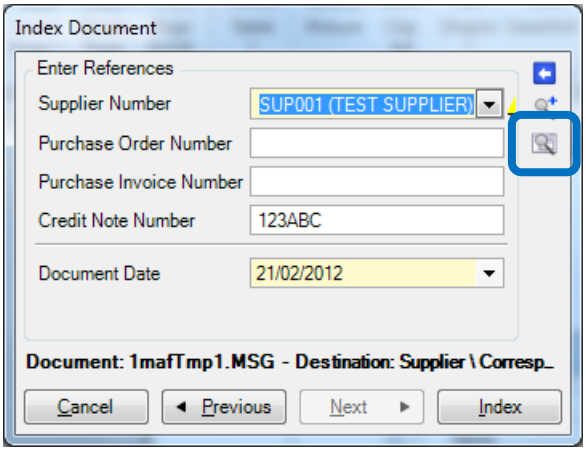

Figure 138

It is also possible for mstore code free integration to be configured so that you must manually choose a code free integration that you want to use to acquire references. This is done by clicking the code free integration button highlighted in Figure 138. This will display the following dialog, showing the available code free integration matches.

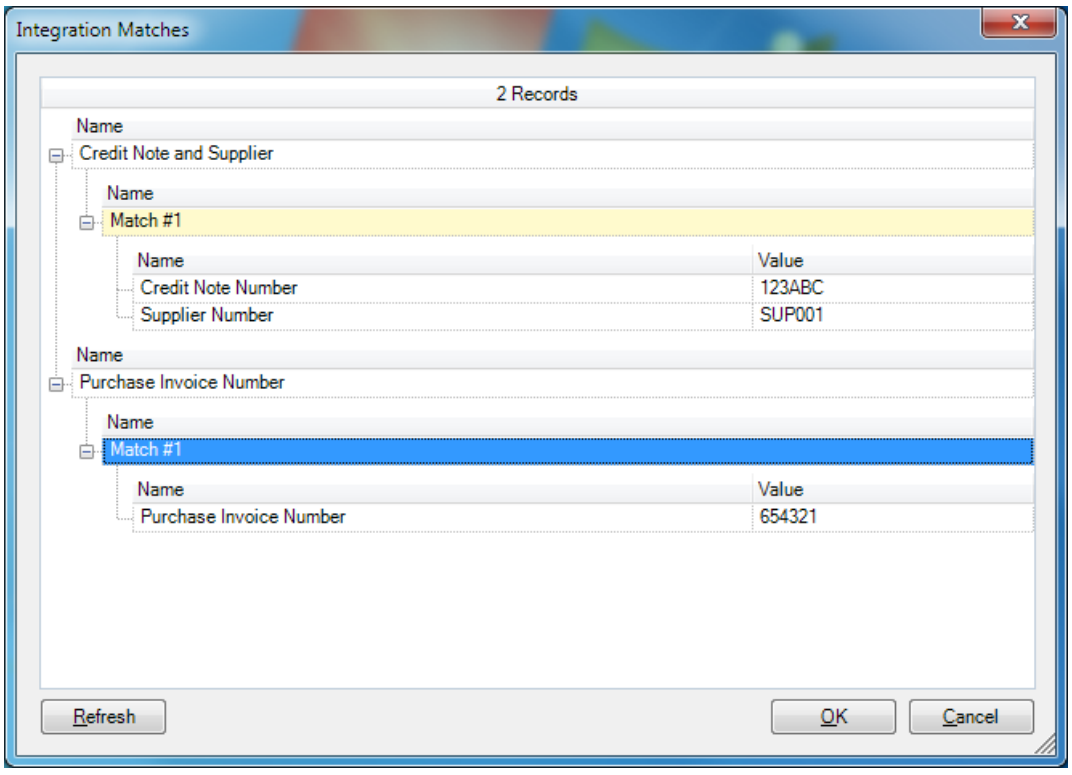

Figure 139

If the Purchase Invoice Number match is selected and then the **OK** button is clicked, the indexing dialog will change to include the selected match acquired using code free integration (Figure 140).

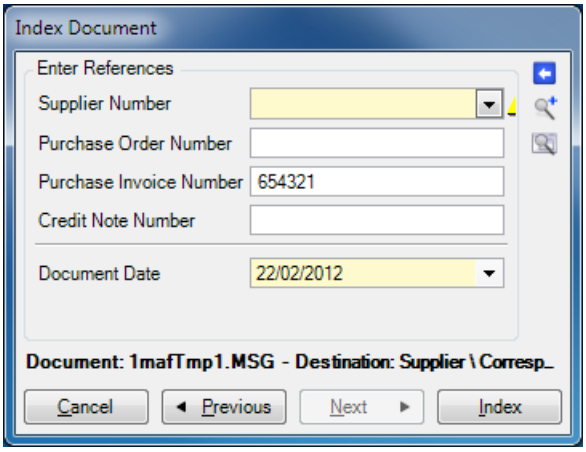

Figure 140

7.5 Setting up mstore Tray

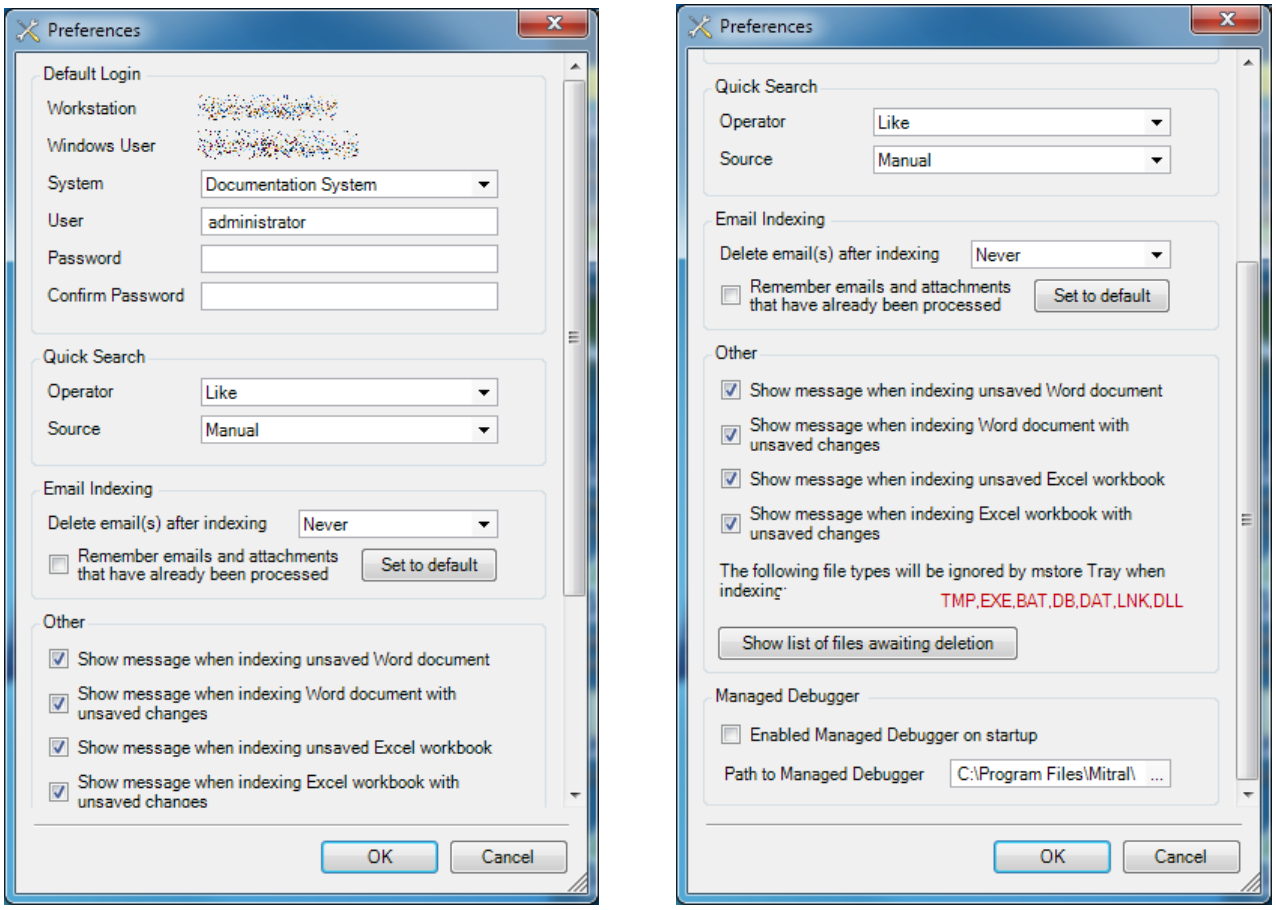

Figure 141

When Tray has loaded up right click and select preferences from the menu, you will then see the preferences window (Figure 141). The right-hand image has been scrolled downwards to reveal the additional settings that are initially off the screen.

Here you can enter the Username and Password (can confirm the password) as well as selecting your preferences for quick search. There are also a variety of other options for how mstore Tray indexes documents.

7.5.1 Default Login

Field Name	Description
Workstation	The name of the computer on which mstore Tray is currently running – read only.
Windows User	The login of the person currently logged on to the workstation – read only.
System	Allows you to switch between mstore systems if you have been configured to use more than one instance.
User	The mstore username which mstore Tray will use to connect to the system.
Password	The password for the user selected above.
Confirm Password	Password confirmation entry.

7.5.2 Quick Search

Field Name	Description
Operator	The type of comparison mstore Tray will use for Quick Searches. **LIKE** Loosely matches values based on a simple comparison. A ‘like’ search for the value ‘map’ would return any value beginning with it (such as mapping, maple, and mapped). **EQUAL TO** Specifies that values will only be returned if the match the search criteria exactly.
Source	Specifies the source of the input text for Quick Searching. **Clipboard** Searches are performed using a text value copied to the clipboard. **Manual** The user must manually type their criteria.

7.5.3

7.5.4 Outlook Indexing

Field Name	Description
Delete email(s) from Outlook after indexing	Controls how mstore Tray deals with emails once they have been indexed to mstore. **NEVER** Emails will always be retained after indexing. **PROMPT** The program will ask whether each email should be deleted after indexing. **ALWAYS** The email will always be deleted after indexing is completed.
Remember emails and attachments that have already been processed	When enabled, this option tells mstore Tray to mark each email / attachment indexed with a special identifier. This identifier tells mstore Tray whether or not an item has been indexed previously. In the event that a user attempts to index an email or attachment which has already been indexed in the past, mstore Tray will display a message box informing the user of this. The user can then make their own decision as to whether or not to continue indexing the item.

7.5.5 Other

Field Name	Description
Show message when indexing unsaved Word document	Sets whether or not mstore Tray will prompt the user with a message if they are attempting to index a document that has not yet been saved, and therefore will not have a filename.
Show message when indexing Word document with unsaved changes	Sets whether or not mstore Tray will prompt the user with a message if they are attempting to index a document with changes that haven't been saved to the main file.
Show message when indexing unsaved Excel workbook	Sets whether or not mstore Tray will prompt the user with a message if they are attempting to index a workbook that has not yet been saved, and therefore will not have a filename.
Show message when indexing Excel workbook with unsaved changes	Sets whether or not mstore Tray will prompt the user with a message if they are attempting to index a workbook with changes that haven't been saved to the main file.
Show list of files awaiting deletion	Brings up a dialog to show any files that may still be present in the designated 'My mstore' folder.

8 Versioning Guide

8.1 What's in this Chapter

mstore keeps a record of all the changes that have occurred to a document so you can view all the previous. You can also check out documents and then check them back in again as new versions. The advantage of check-out/check-in over exporting and re-indexing is that the document is reserved for you and cannot be edited by anyone else. Versioning allows you to:-

- Recover from incorrect changes, such as deleted pages or changed references
- Import and index a new version of the document
- Import and index an older version of the document
- Index documents to be historic versions or to be the current version
- Check-out and Check-in a new document

This chapter will explain,

- Access the versions of a document
- Viewing different versions
  - View Version
  - View Version (New Window)
  - View Side-By-Side
  - View Current
- Checking in/out documents
  - Check-Out
  - Check-In
- Indexing Versions
  - Updating the current version
  - Creating a historic version
  - Appending pages

8.2 Access the versions of a document

Open the document and click on the **Versions** tab (Figure 142) on the lower half of the screen to view the documents Versions (Figure 143).

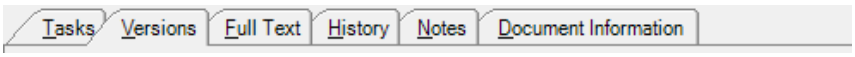

Figure 142

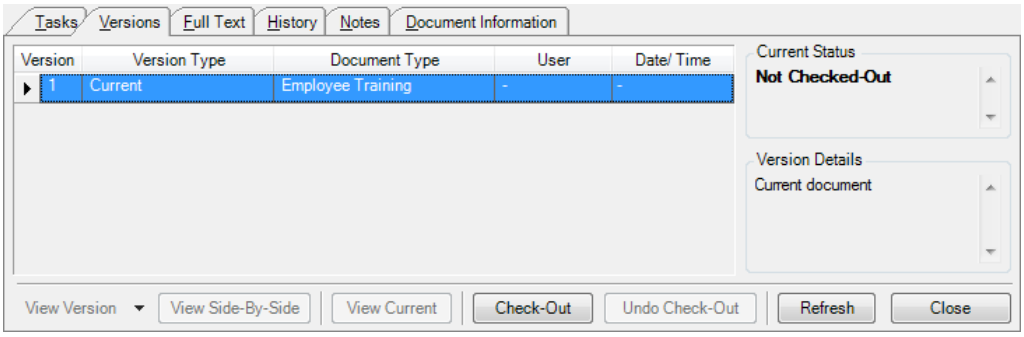

Figure 143

The grid contains a list of all the changes to the document (Figure 143) and by selecting them, the **Version Details** section on the right will give you more information. The document in the example above does not yet have any versions.

8.3 Viewing different versions

The system always displays the latest version at the top of the list of versions (current version is highlighted green), with progressively older versions listed below. Also notice that the **Versions** tab has a small icon next to the caption when versions of a document are available.

You can view the version 3 different ways:-

- In the viewer above
- In a new tab
- Next to the viewer; side by side

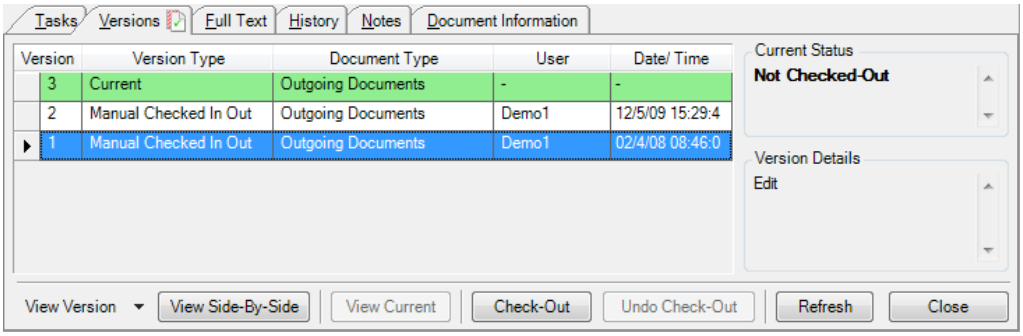

Figure 144

8.3.1 View Version

This will show the document in the above viewer.

To do this either click on **View Version** shown in Figure 144 with the version you wish to view selected, or double click on the version you wish to view.

8.3.2 View Version (New Window)

This will open a new tab for just the version of the document.

To do this click on the ▼ button and select **View Version (New Window)** shown in Figure 144.

8.3.3 View Side-By-Side

This will open the document in the same way as **View Version (New Window)** but it will split the page so the documents are side by side.

To do this click on the **View Side-By-Side** button shown in Figure 144.

8.3.4 View Current

This will change the currently displayed document back to the current version of the document.

Figure 145

When viewing older documents the version (Figure 145) will be displayed in the top left of the viewer. Floating the mouse cursor over this will cause it to relocate to the bottom left and vice versa.

8.4 Checking in/out documents

Checking in/out of documents is a method of temporarily exporting a document out of mstore to be put back in after editing (Figure 146).

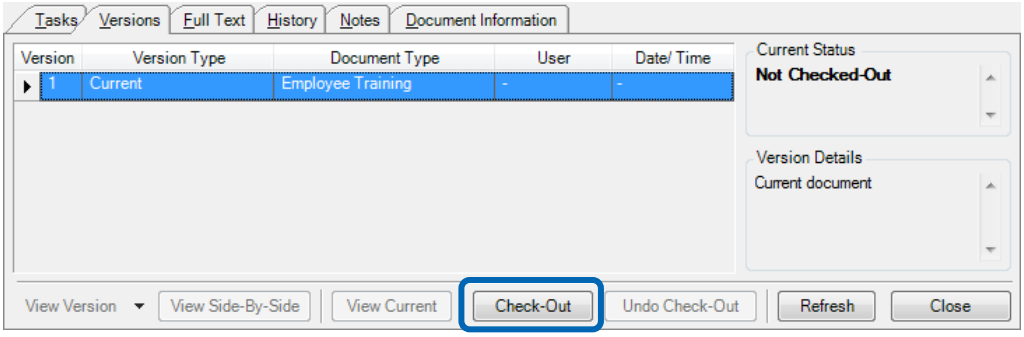

Figure 146

8.4.1 Check-Out

Click on the **Check-Out** button to open the **Check-Out Dialog** (Figure 147), **Browse** to a location to save the document then enter the details of why the document is checked out. Enabling the setting **Open checked out file in folder** will open a Windows Explorer window showing the location where your file was checked out to.

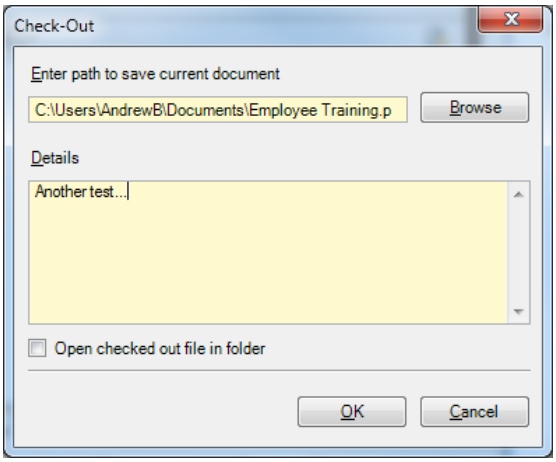

Figure 147

Now within the versions tab the document cannot be checked out (Figure 148), the tab name is coloured red to signify the document is checked out and the **Current Status** has been changed.

Only you can **Check-In** or **Undo Check-Out**.

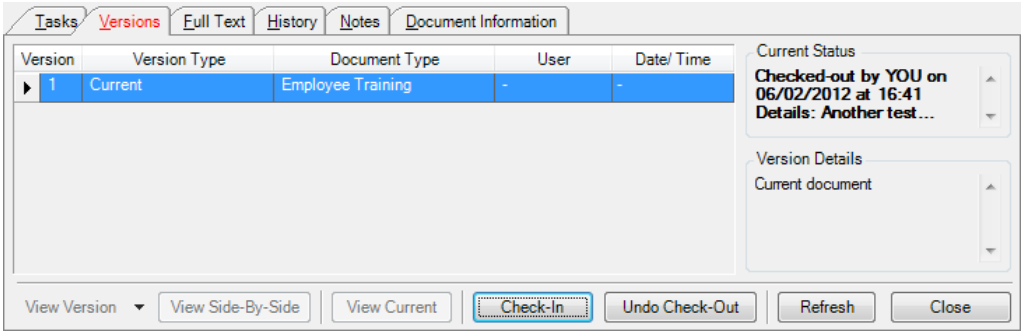

Figure 148

8.4.2 Check-In

Clicking **Undo Check-Out** will undo the process, click on **Check-In** to open the **Check-In Dialog** (Figure 149). Make sure you are browsing to the right file name and optionally fill in more details, then click **OK**.

You can check in any file, it does not have to be the one that you have checked out. Enabling the option **Delete File After Check-In** will delete the original copy of the file specified in the path box, once the check-in process is successfully completed.

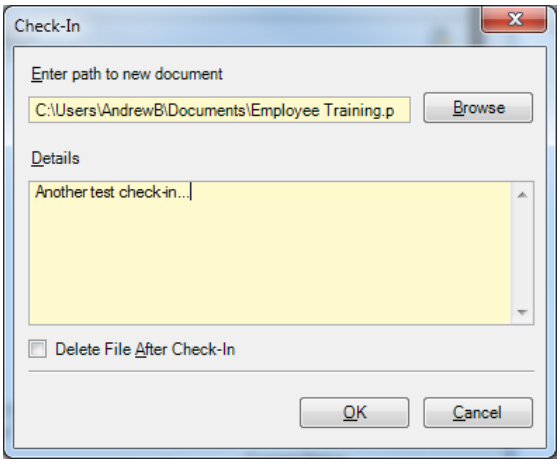

Figure 149

A new version of the document will be created for the document that has just been checked in; this will now be the current document (Figure 150).

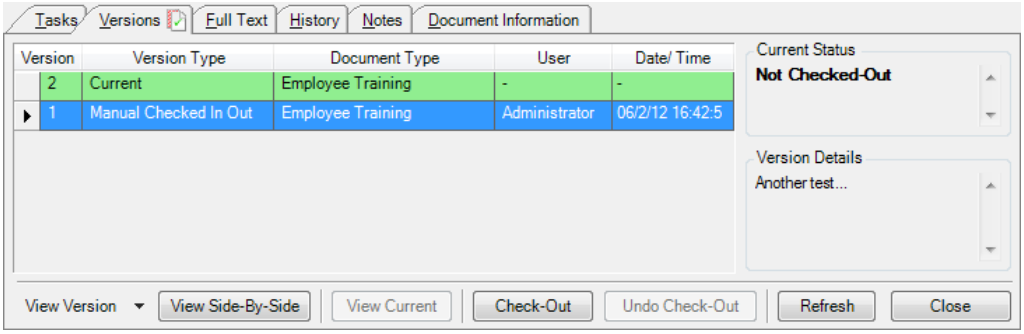

Figure 150

8.5 Indexing Versions

When you are indexing via mstore tray or within incoming documents you will see the **Lookup** button, this allows you to index a document to an existing document, creating a new version or slotting it in as an historic version. You can also add pages to the current version, or replace it.

To do this type in some information that matches the document when indexing or re-indexing and click on the button (located below the references area on the left of the screen).

This will open a form (see Figure 151) allowing you to choose a document with options. After clicking on **OK** you will be taken back to indexing and will now have the option to clear. Unless you click clear the versions of the document indexing to will be altered instead of creating a new document (or updating itself).

8.5.1 Updating the current version

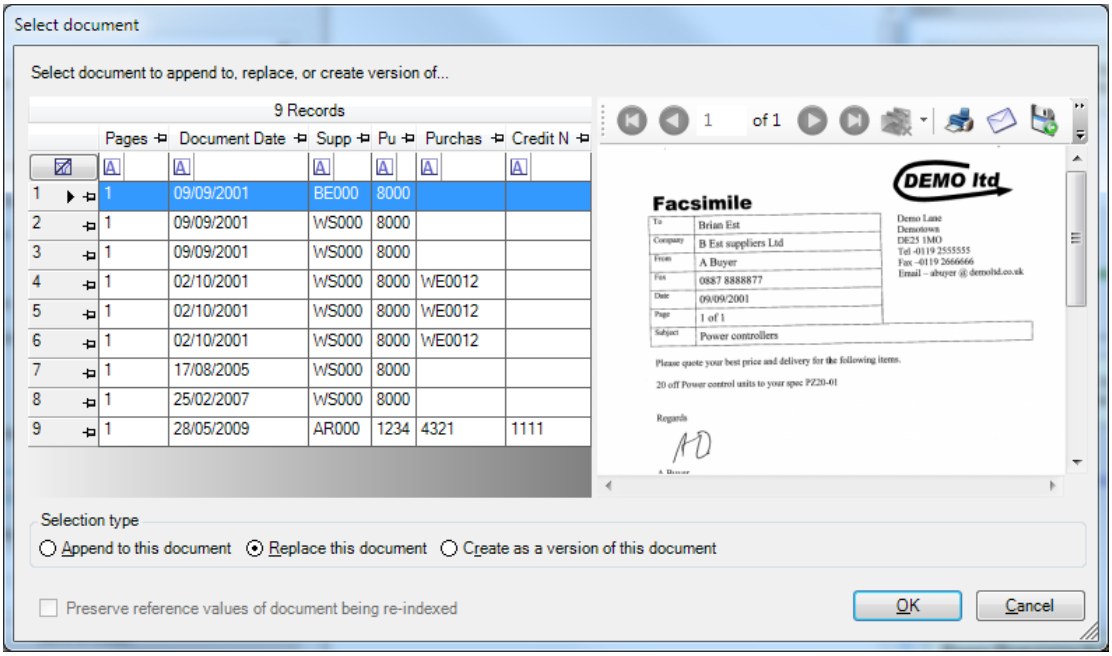

Figure 151

Should you require it mstore offers you the ability to completely replace the current version of a document with an entirely different one. Performing this option will not create a new current version; it will simply overwrite the existing current version document with the new one. To do this you will need to select the option **Replace This Document** in the above form, and then click the **OK** button. Optionally you can select the check box at the bottom of the screen, which will cause mstore to preserve the reference values of the re-index document.

8.5.2 Creating a historic version

This is similar to updating the current version except the version created will be placed directly under the current version, with either its own or the existing documents references. In order to do this you need to select the option for **Create As A Version Of This Document** followed by the **OK** button.

8.5.3 Appending pages

When indexing / re-indexing TIF documents you can choose to add the pages to the end of the current version (creating a new version with the new pages attached). With this option the document being re-indexed will lose its references.

9 Related Documents Guide

9.1 What's in this Chapter

mstore can dynamically link documents together regardless of their document type or the cabinet they are in. This means that any documents which share a common factor, such as customer, can be connected and viewed in a document's Related Documents.

Related Documents allows you to:-

- Quickly navigate between documents which are linked together,
- Create an electronic staple between documents automatically upon index.

This chapter will explain,

- Accessing Related Documents
- Viewing related documents
    - View Related
    - View Related (New Window)
    - View Side-By-Side
    - View Original
- Bulk related document operations
    - Bulk Export
    - Bulk Email

9.2 Accessing Related Documents

Open the document and click on the **Related Documents** tab (Figure 152) at the lower half of the screen to view any documents that are related to the document currently being displayed (Figure 154).

Notice that in Figure 153 the **Related Documents** tab doesn't have a small paper clip icon next to the caption. This informs you at a glance that there aren't any related documents for the document you are currently viewing.

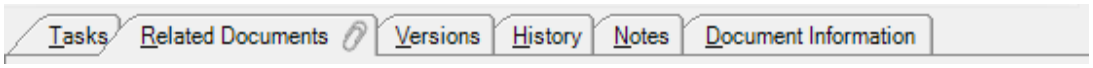

Figure 152

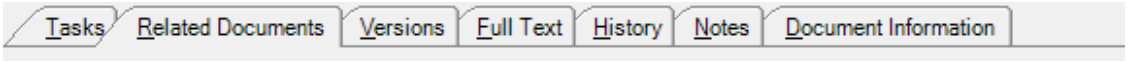

Figure 153

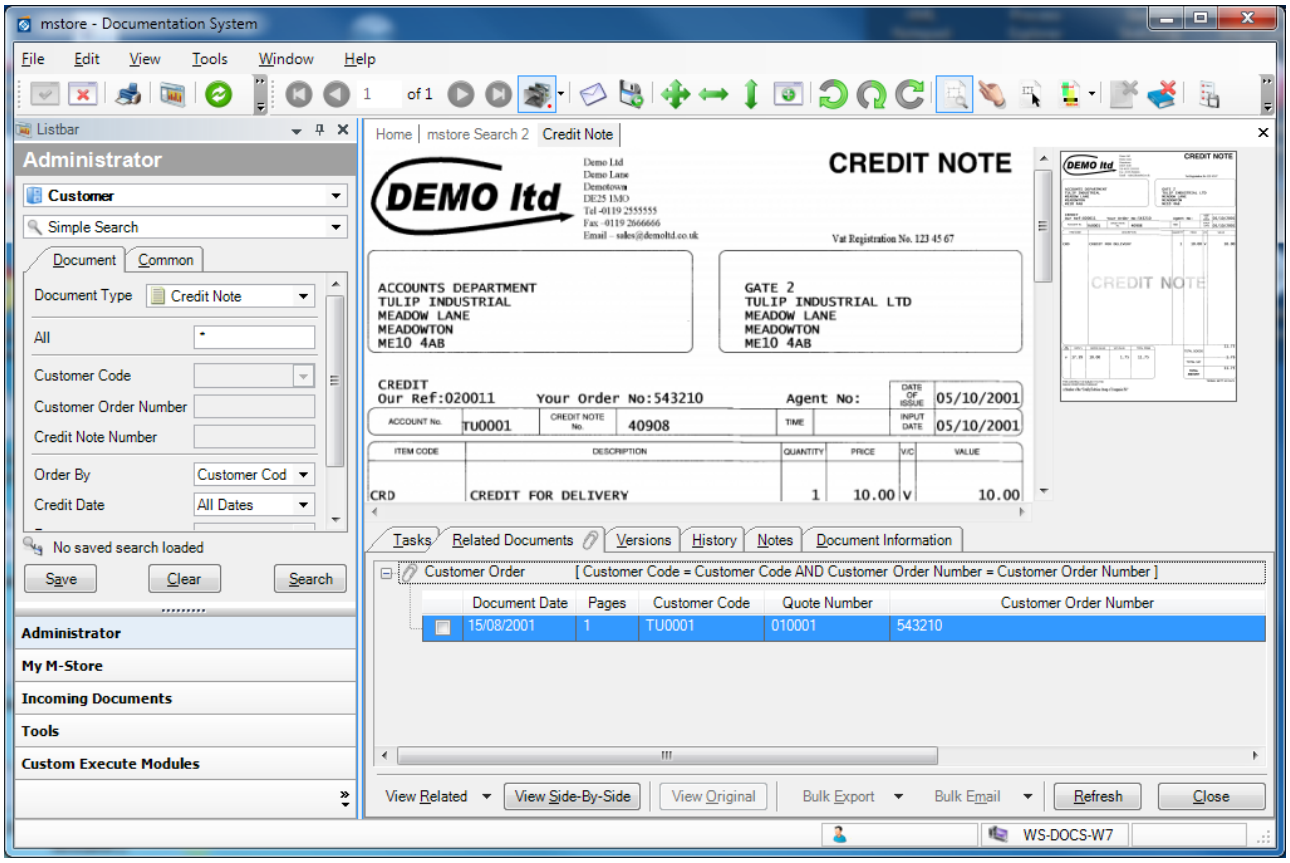

Figure 154

When setting up the configuration for related documents, mstore allows you to configure more than one relationship. For example you may wish to relate a delivery note to supplier, and to the buyer who made the purchase. In the screenshot in Figure 154, there are two document relationships configured. The first relationship has matched a single

document with customer code ‘TU0001’. However a match has not been found for the second relationship, so this is simply displayed as a yellow bar. This can be enabled and disabled using the Default Display Settings dialog. Please see the appendix for more information about this.

If there aren’t any related documents for the document you are currently viewing, a message will be displayed if the related documents tab is selected (see below).

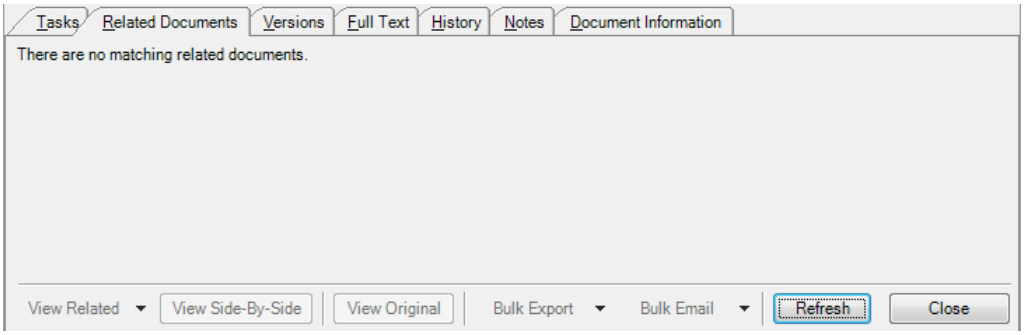

Figure 155

9.3 Viewing related documents

In the **Related Documents** tab (Figure 154) select the related document you wish to view.

You can view the related document 3 different ways:-

- In the viewer above,
- In a new tab,
- Next to the viewer, side by side.

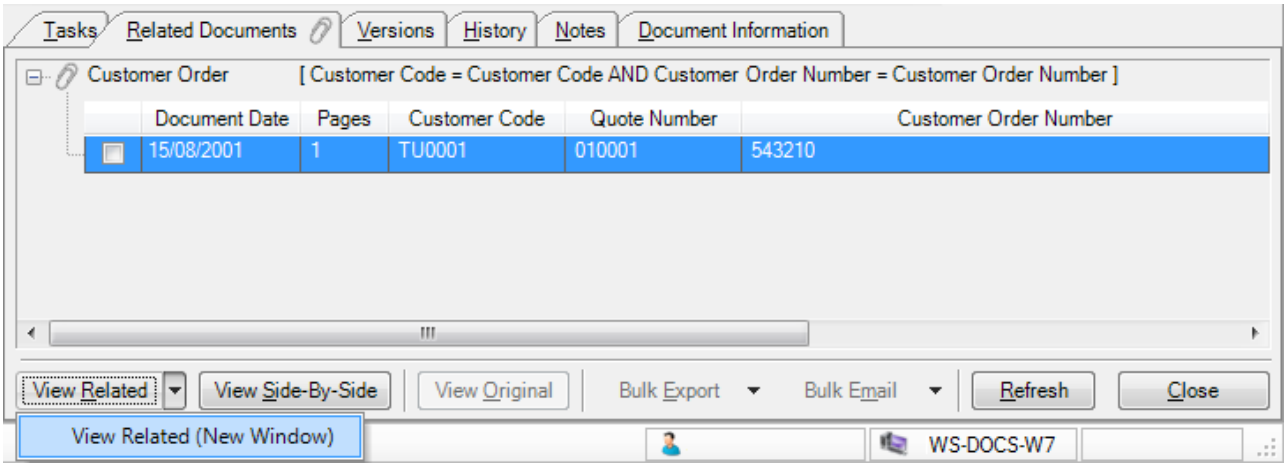

Figure 156

9.3.1 View Related

This will show the document in the above viewer.

To do this either click on **View Related** shown in Figure 156 with the related document you wish to view selected, or double click on the related document in the list you wish to view.

9.3.2 View Related (New Window)

This will launch open a new tab for the related document.

To do this click on the ▼ button and select **View Related (New Window)** shown in Figure 156.

9.3.3 View Side-By-Side

This will open the document in the same way as **View Related (New Window)** but it will split the page so the documents are side by side.

To do this click on the **View Side-By-Side** button shown in Figure 156.

9.3.4 View Original

This will change the currently displayed document back to the original document.

9.4 Bulk related document operations

Two extra buttons are provided on the related documents tab that allow you to export related documents in one of two different ways:

- Document Export
- Email

9.4.1 Bulk Export

In the event of a document having multiple related documents, this option will allow you to export those documents in one simple step.

Before clicking **Bulk Export** you will need to place a tick against each related document in the list that you'd like to export (see Figure 157).

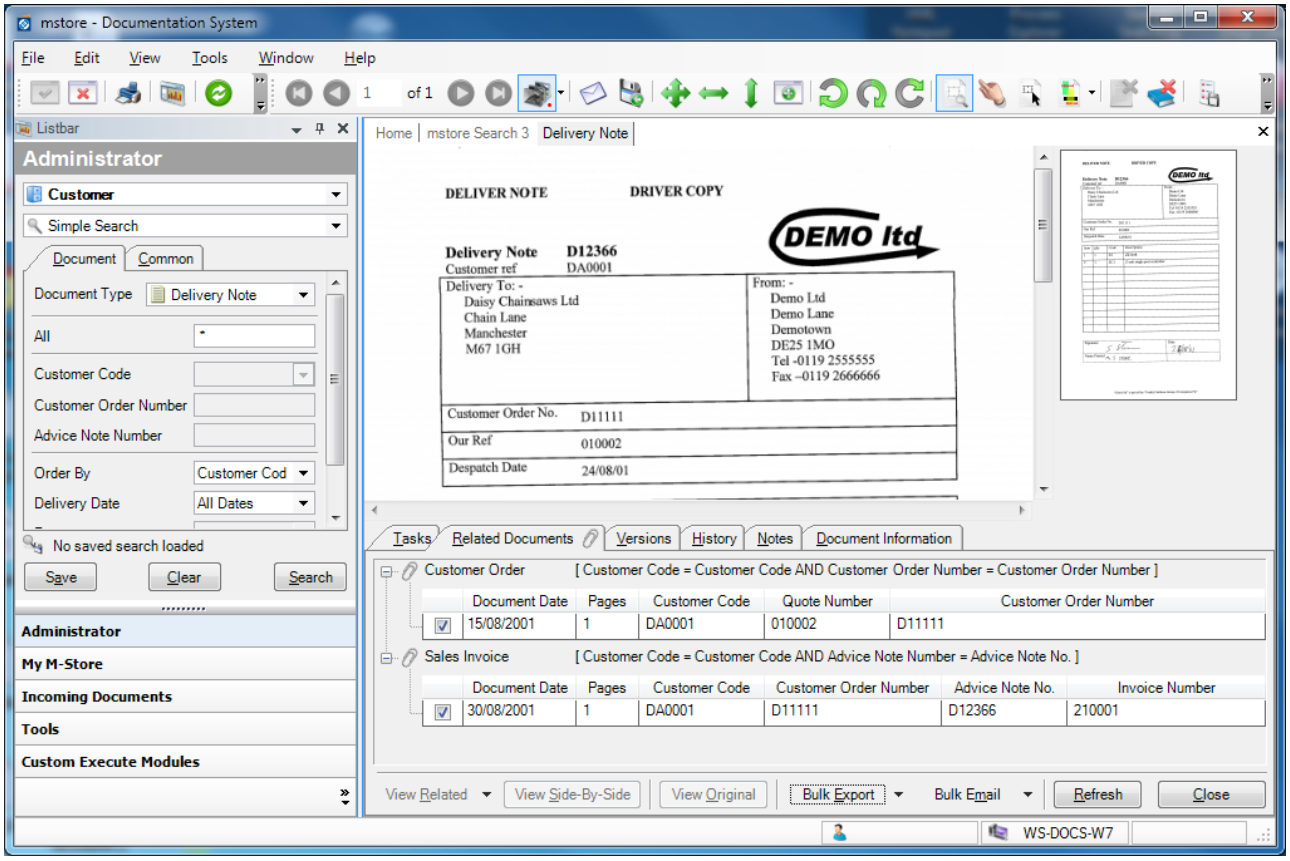

Figure 157

If you click the small arrow ▼ next to the bulk export button, a dropdown will appear allowing you to choose whether or not you'd like the just export the related documents, or also include a copy of the original document too.

After clicking the button you will be taken to the standard mstore Bulk Export screen where you can configure where the exported files should be placed (see Figure 158).

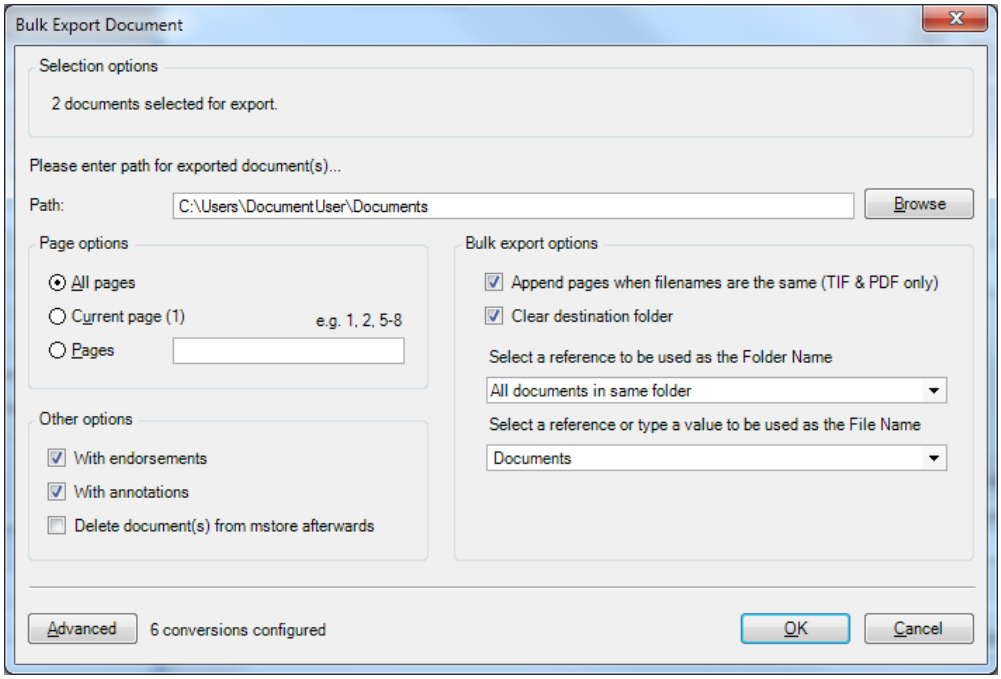

Figure 158

9.4.2 Bulk Email

In pretty much the same way as exporting the document files, you can also email the related document files either with or without the original included.

The main difference is that when bulk email is clicked, you are presented with the bulk email dialog shown below.

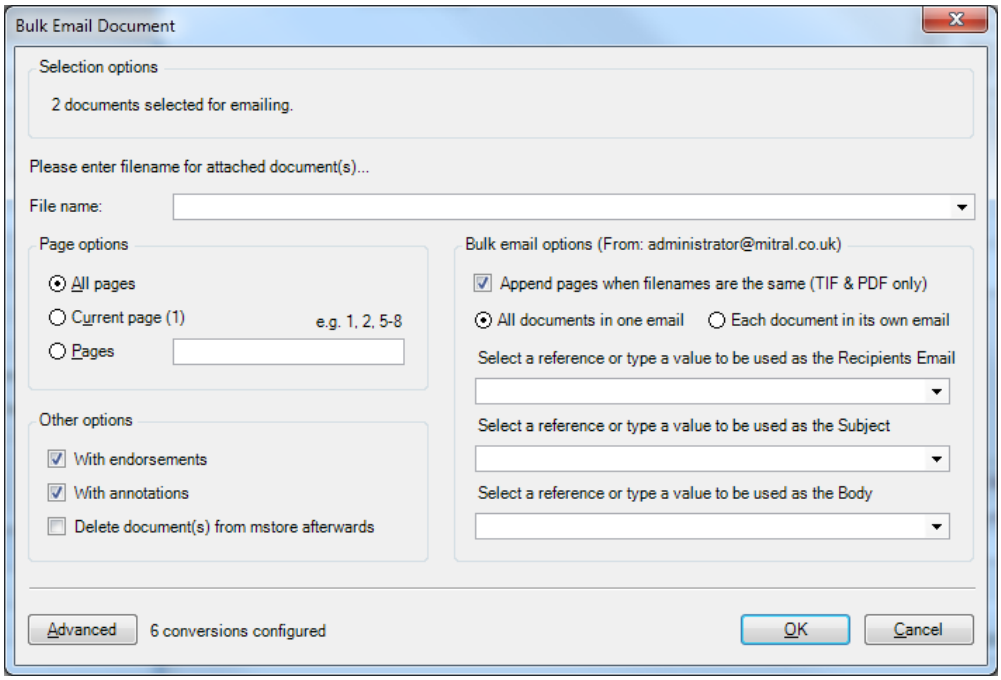
Bulk Email Document
Selection options
2 documents selected for emailing.
Please enter filename for attached document(s)...
File name:
Page options
All pages
Current page (1)
e.g. 1, 2, 5-8
Pages
Other options
With endorsements
With annotations
Delete document(s) from mstore afterwards
Bulk email options (From: administrator@mitral.co.uk)
Append pages when filenames are the same (TIF & PDF only)
All documents in one email
Each document in its own email
Select a reference or type a value to be used as the Recipients Email
Select a reference or type a value to be used as the Subject
Select a reference or type a value to be used as the Body
Advanced
6 conversions configured
OK
Cancel

Figure 159

10 Emailing Documents Guide

10.1 What's in this Chapter

If Outlook is installed on the same machine as mstore, this will enable mstore to index emails via mstore tray. Emails can also be sent from mstore provided that either Outlook or Novell GroupWise is installed. Once the system administrator has entered your email address against your user details, you'll be able to take advantage of this feature. Features are also provided to allow bulk emailing to take place when an email address is used as an mstore reference.

With mstore you can:-

- Email a document and edit the message
- Silently email documents
- Email more than one document

This chapter will explain,

- Emailing a single document
- Emailing multiple documents
- File Format Conversion

10.2 Emailing a single document

In mstore select a document in a list or open a document then click on the **Email** button on the toolbar (Figure 160).

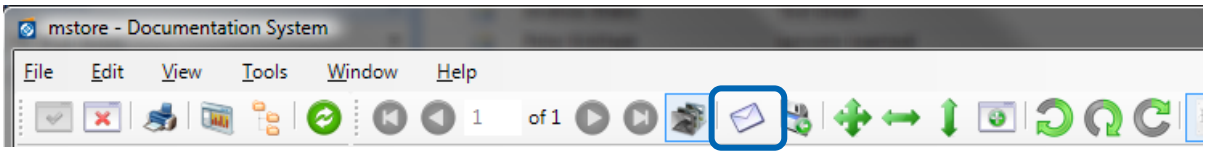

Figure 160

In the **Email Document form** (Figure 161) enter a filename and check the enabled settings, then click **OK**.

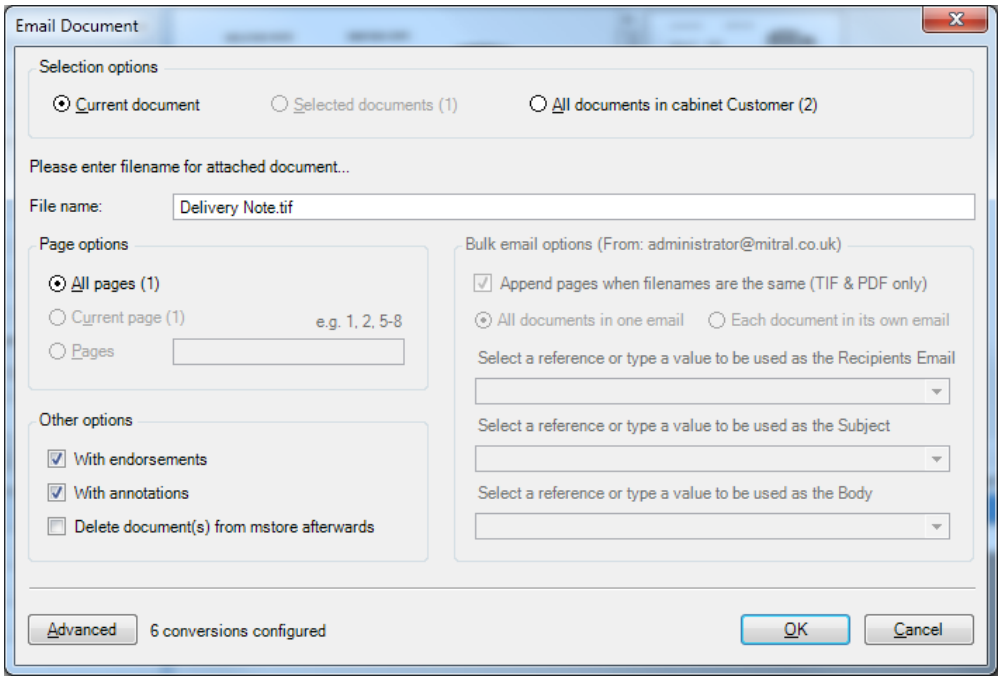
Email Document
Selection options
Current document
Selected documents (1)
All documents in cabinet Customer (2)
Please enter filename for attached document...
File name:
Delivery Note.tif
Page options
All pages (1)
Current page (1)
e.g. 1, 2, 5-8
Pages
Bulk email options (From: administrator@mitral.co.uk)
Append pages when filenames are the same (TIF & PDF only)
All documents in one email
Each document in its own email
Select a reference or type a value to be used as the Recipients Email
Select a reference or type a value to be used as the Subject
Select a reference or type a value to be used as the Body
Other options
With endorsements
With annotations
Delete document(s) from mstore afterwards
Advanced
6 conversions configured
OK
Cancel

Figure 161

A new message will now be created and displayed in either Outlook or GroupWise (subject to workstation preferences); it will have the document as an attachment (Figure 162).

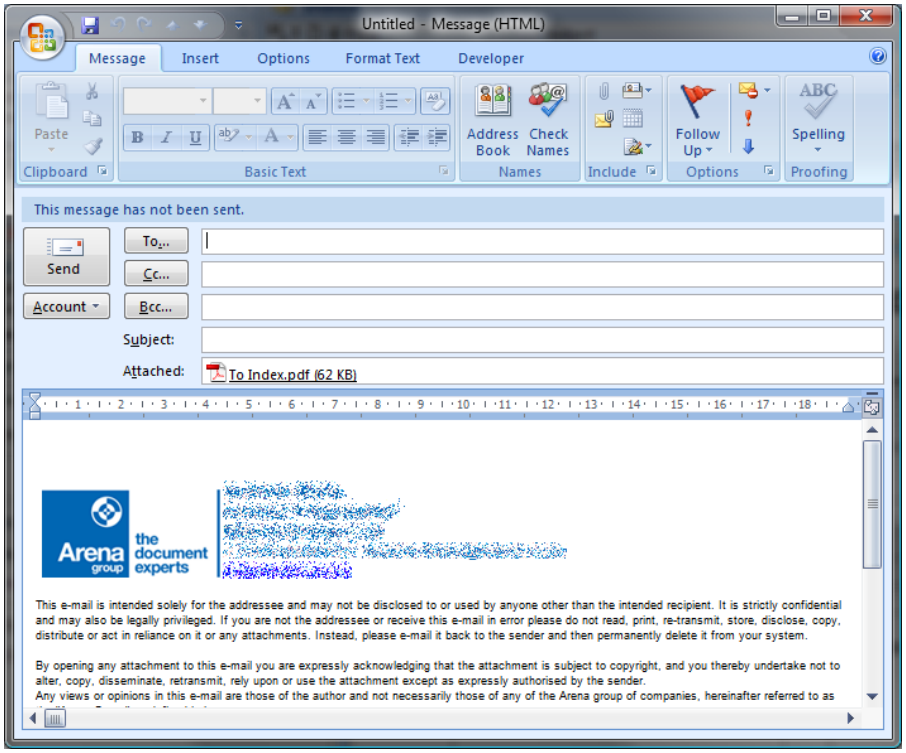
Untitled - Message (HTML)
Message
Insert
Options
Format Text
Developer
Paste
Clipboard
Basic Text
Address Book
Check Names
Names
Include
Follow Up
Options
Spelling
Proofing
This message has not been sent.
Send
To...
Cc...
Account
Bcc...
Subject:
Attached:
To Index.pdf (62 KB)
Arena group
the document experts
This e-mail is intended solely for the addressee and may not be disclosed to or used by anyone other than the intended recipient. It is strictly confidential and may also be legally privileged. If you are not the addressee or receive this e-mail in error please do not read, print, re-transmit, store, disclose, copy, distribute or act in reliance on it or any attachments. Instead, please e-mail it back to the sender and then permanently delete it from your system.
By opening any attachment to this e-mail you are expressly acknowledging that the attachment is subject to copyright, and you thereby undertake not to alter, copy, disseminate, retransmit, rely upon or use the attachment except as expressly authorised by the sender.
Any views or opinions in this e-mail are those of the author and not necessarily those of any of the Arena group of companies, hereinafter referred to as

Figure 162

10.3 Emailing multiple documents

In mstore select a range of documents in a list then click on the **Email** button on the toolbar[1] (Figure 163).

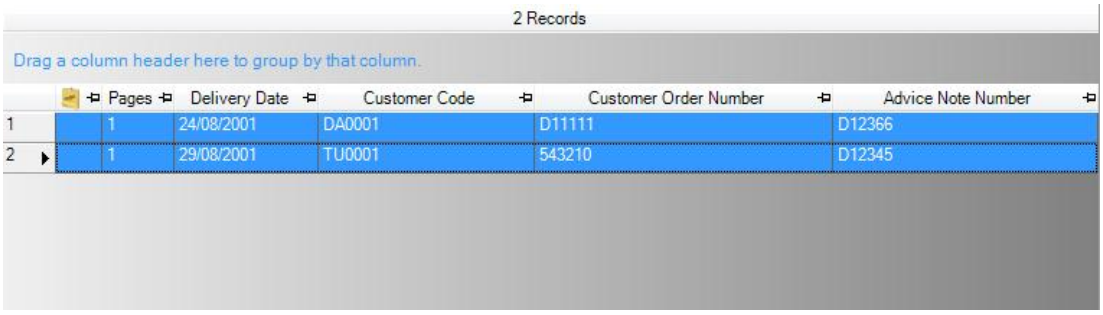

Figure 163

The **Email Documents form** (Figure 164) will now appear with the **Bulk emailing section** enabled.

[1] To select a range of documents hold shift and click on another row, this will select all the documents between the document you were on and the document you selected. You can also use the control key to individually select multiple documents.

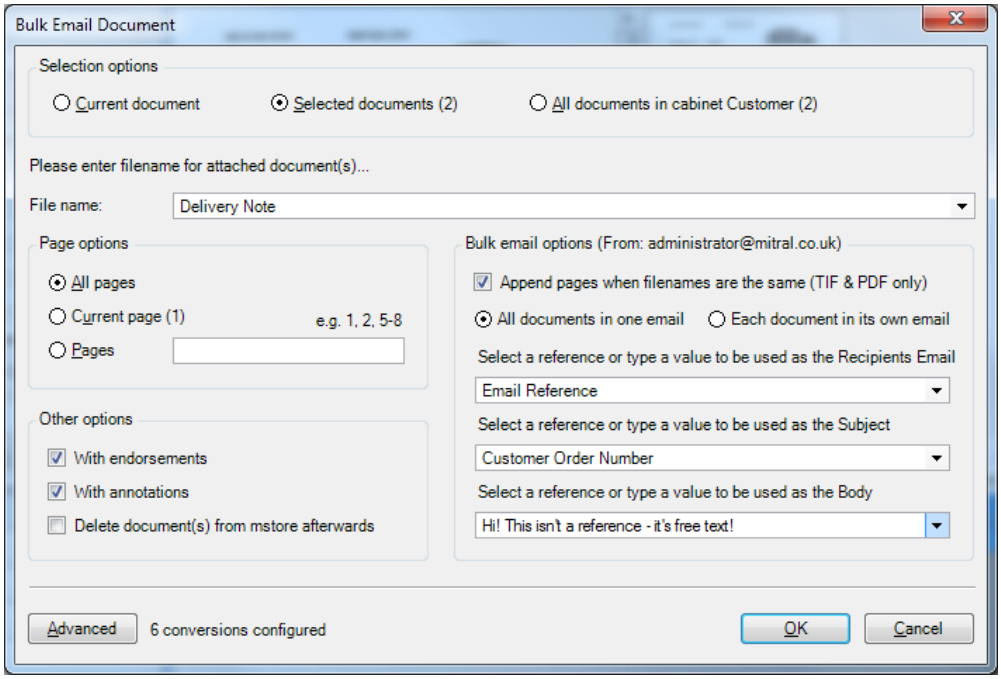
Bulk Email Document
Selection options
Current document
Selected documents (2)
All documents in cabinet Customer (2)
Please enter filename for attached document(s)...
File name:
Delivery Note
Page options
All pages
Current page (1)
e.g. 1, 2, 5-8
Pages
Other options
With endorsements
With annotations
Delete document(s) from mstore afterwards
Bulk email options (From: administrator@mitral.co.uk)
Append pages when filenames are the same (TIF & PDF only)
All documents in one email
Each document in its own email
Select a reference or type a value to be used as the Recipients Email
Email Reference
Select a reference or type a value to be used as the Subject
Customer Order Number
Select a reference or type a value to be used as the Body
Hi! This isn't a reference - it's free text!
Advanced
6 conversions configured
OK
Cancel

Figure 164

You now must enter the email details in the **Bulk email options** section as well as the options for a single document. The resulting email will now appearing in Outlook or GroupWise depending on which client you use, allowing you to amend the message if necessary and finally send it.

The **File name** dropdown controls how the attachment will be named once it is appended to the email. The dropdown contains a list of references that can be used, or you can type a filename directly into the dropdown.

If you select “Each document in its own email” the emails will be sent silently.

10.4 File Format Conversion

At the bottom of the email dialog, there is a ‘Conversions’ button in the bottom left corner of the window. This allows specific file types to be converted on-the-fly to other types before being processed. For example you may decide that all your TIF documents need to be transferred as PDF documents. This inline conversion will allow you to do this. Please see the chapter on ‘Export’ for more information regarding this feature.

11 Exporting Documents Guide

11.1 What's in this Chapter

mstore can save documents to your pc so that you can edit them with other software or send the documents outside of the system. This can be done either by exporting a document or by checking in/out with versioning. With exporting you can also export multiple documents at once and you can still put the new document into mstore again later via indexing.

This chapter will explain,

- Exporting a single document
- Exporting multiple documents
- File Format Conversion
    - Advanced PDF Conversion Options

11.2 Exporting a single document

In mstore select a document in a list or open a document then click on the **Export** button on the toolbar (Figure 165).

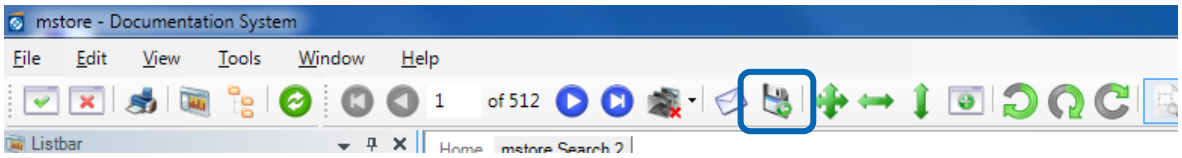

Figure 165

In the Export Document form (Figure 166) **Browse** to a location to place the file and check the enabled settings, then click **OK**.

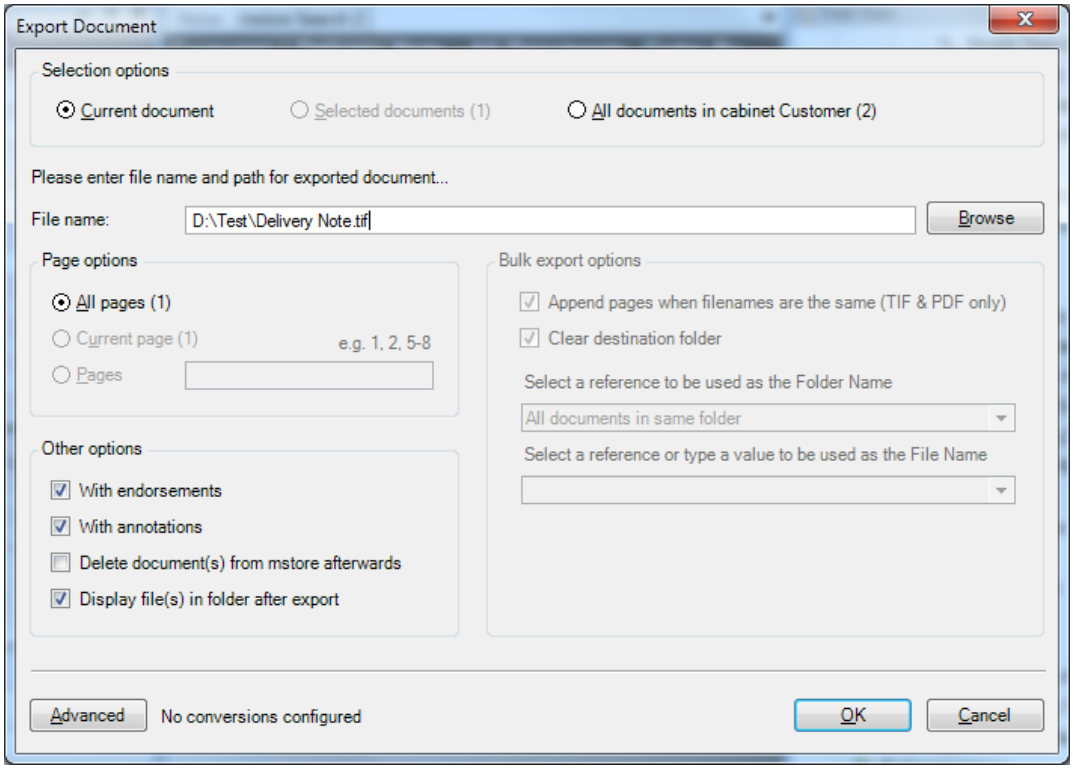

Figure 166

The file will now be saved to that location.

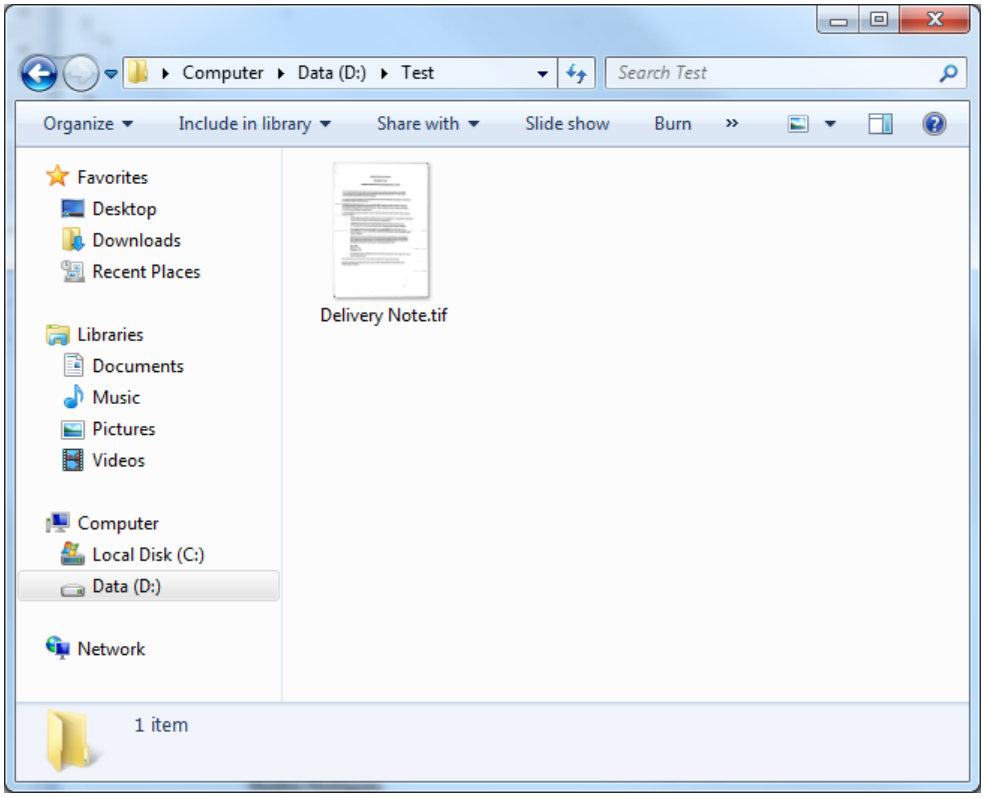

Figure 167

11.3 Exporting multiple documents

In mstore select a range of documents in a list then click on the **Export** button on the toolbar[2] (Figure 168).

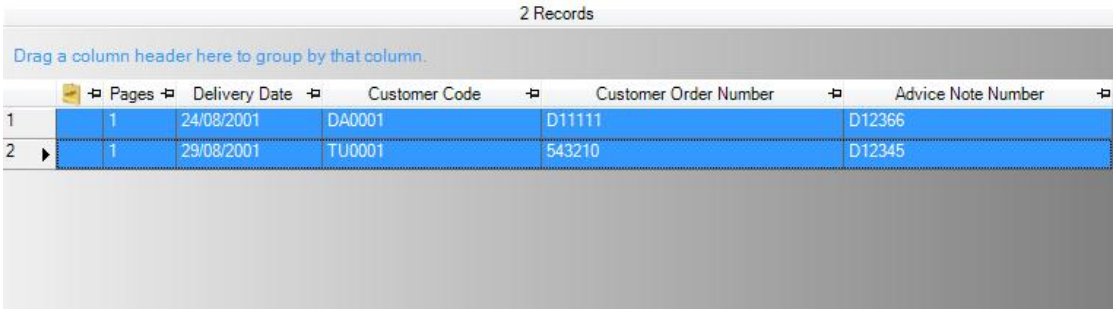

Figure 168

The **Export Documents form** (Figure 169) will now appear with the bulk exporting section enabled.

[2] To select a range of documents hold shift and click on another row, this will select all the documents between the document you were on and the document you selected. You can also use the control key to individually select multiple documents.

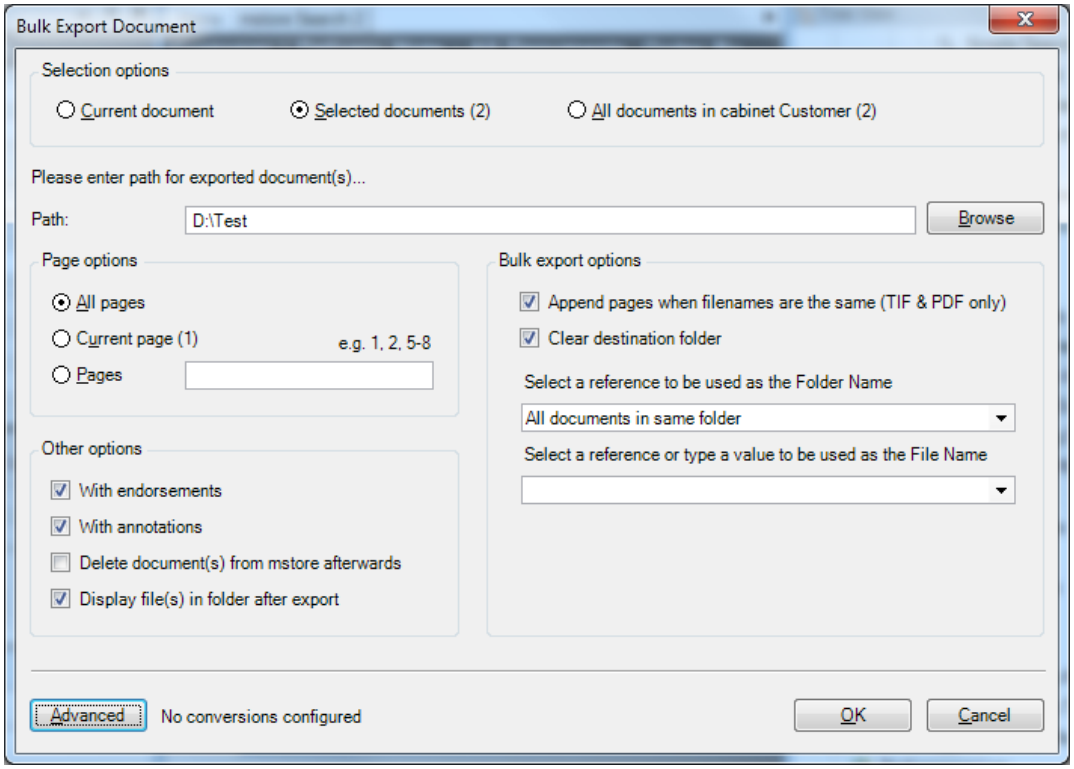

Figure 169

Browse to a location to place the files and check the enabled settings, then click **OK**.

11.4 File Format Conversion

As of version 2.0.5.1, mstore now offers the ability to perform inline file format conversions when exporting or emailing documents. This is currently supported for the following image types.

- Tagged Image File (TIF)
- JPEG (JPG)
- Graphics Interchange Format (GIF)
- Windows Bitmap (BMP)
- Portable Network Graphics (PNG)
- Adobe Portable Document Format (PDF)

By default all images are exported as Adobe PDF files. The facility for configuring these conversions can be accessed from either the email or export settings dialogs as in Figure 170.

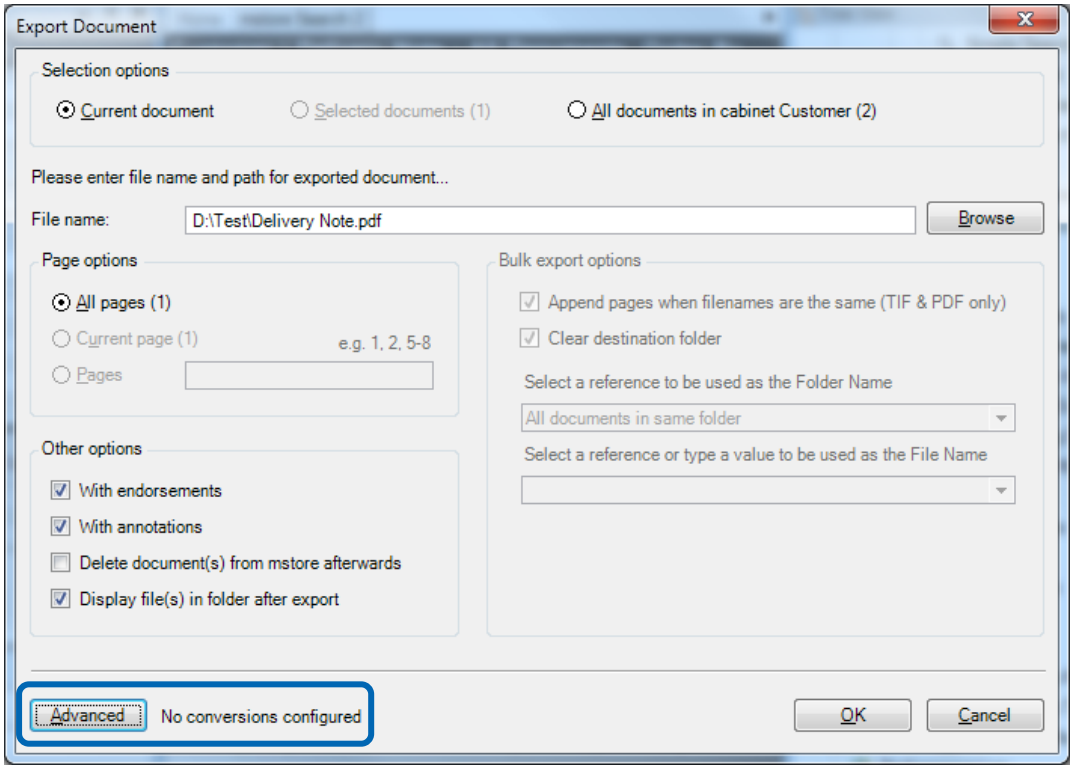

Figure 170

The text next to the button informs you of how many conversions are currently configured. In this case there are no conversions defined. Clicking the button will display the following dialog (Figure 171).

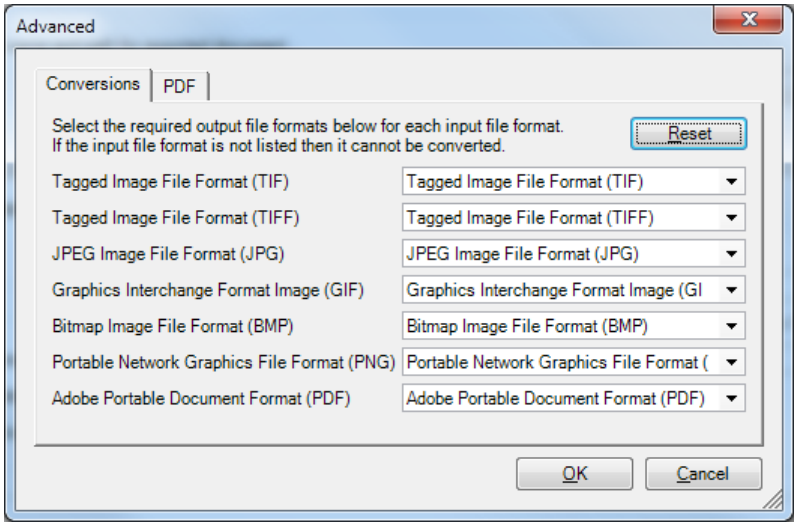
Advanced
Conversions
PDF
Select the required output file formats below for each input file format.
If the input file format is not listed then it cannot be converted.
Reset
Tagged Image File Format (TIF)
Tagged Image File Format (TIF)
Tagged Image File Format (TIFF)
Tagged Image File Format (TIFF)
JPEG Image File Format (JPG)
JPEG Image File Format (JPG)
Graphics Interchange Format Image (GIF)
Graphics Interchange Format Image (GI
Bitmap Image File Format (BMP)
Bitmap Image File Format (BMP)
Portable Network Graphics File Format (PNG)
Portable Network Graphics File Format (
Adobe Portable Document Format (PDF)
Adobe Portable Document Format (PDF)
OK
Cancel

Figure 171

The conversion mapping works using a two-column approach. The labels on the left of the dialog correspond to the format that the image is currently in. The combo boxes on the right allow you to define what format you would like the file in before it is attached to an email or exported.

The Reset button will remove all set file conversions from the system, which will result in files being exported in their native format.

If the conversion mapping for TIF files is changed to PDF as in Figure 172, whenever a TIF file is exported from the system, it will be converted to a PDF file beforehand.

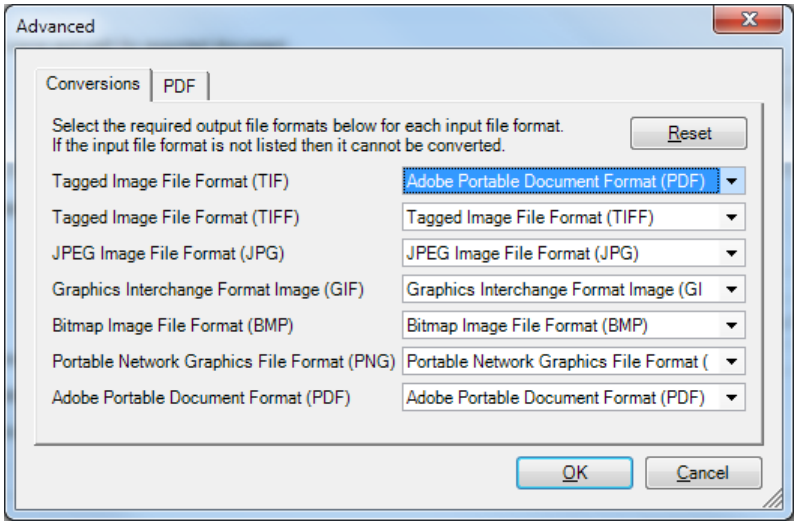
Advanced
Conversions
PDF
Select the required output file formats below for each input file format.
If the input file format is not listed then it cannot be converted.
Reset
Tagged Image File Format (TIF)
Adobe Portable Document Format (PDF)
Tagged Image File Format (TIFF)
Tagged Image File Format (TIFF)
JPEG Image File Format (JPG)
JPEG Image File Format (JPG)
Graphics Interchange Format Image (GIF)
Graphics Interchange Format Image (GI
Bitmap Image File Format (BMP)
Bitmap Image File Format (BMP)
Portable Network Graphics File Format (PNG)
Portable Network Graphics File Format (
Adobe Portable Document Format (PDF)
Adobe Portable Document Format (PDF)
OK
Cancel

Figure 172

If a TIF file is now exported from the system, the export options dialog will feature the following changes (Figure 173). Note the change to the conversion type label in the bottom-left of the window.

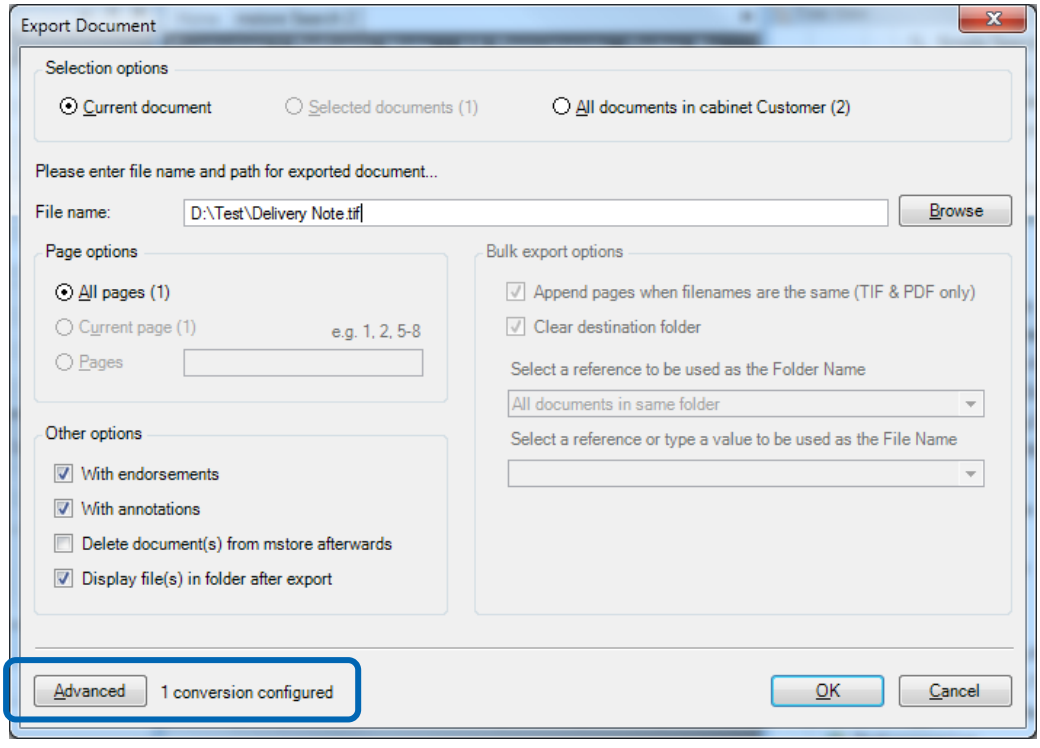

Figure 173

When the document is physically exported, instead of a TIF file being in the destination folder (as the ‘File name:’ field would have suggested), we have a PDF document instead which contains the TIF files’ content.

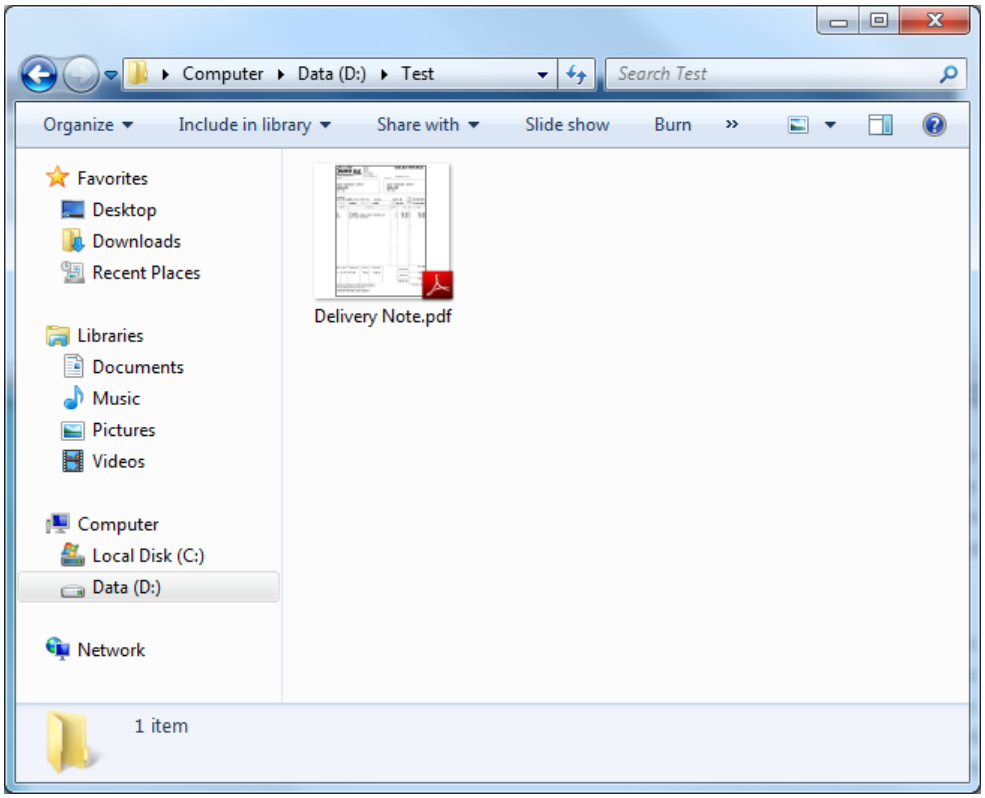

Figure 174

The PDF file can then be opened in an Acrobat-compatible reader (Figure 175).

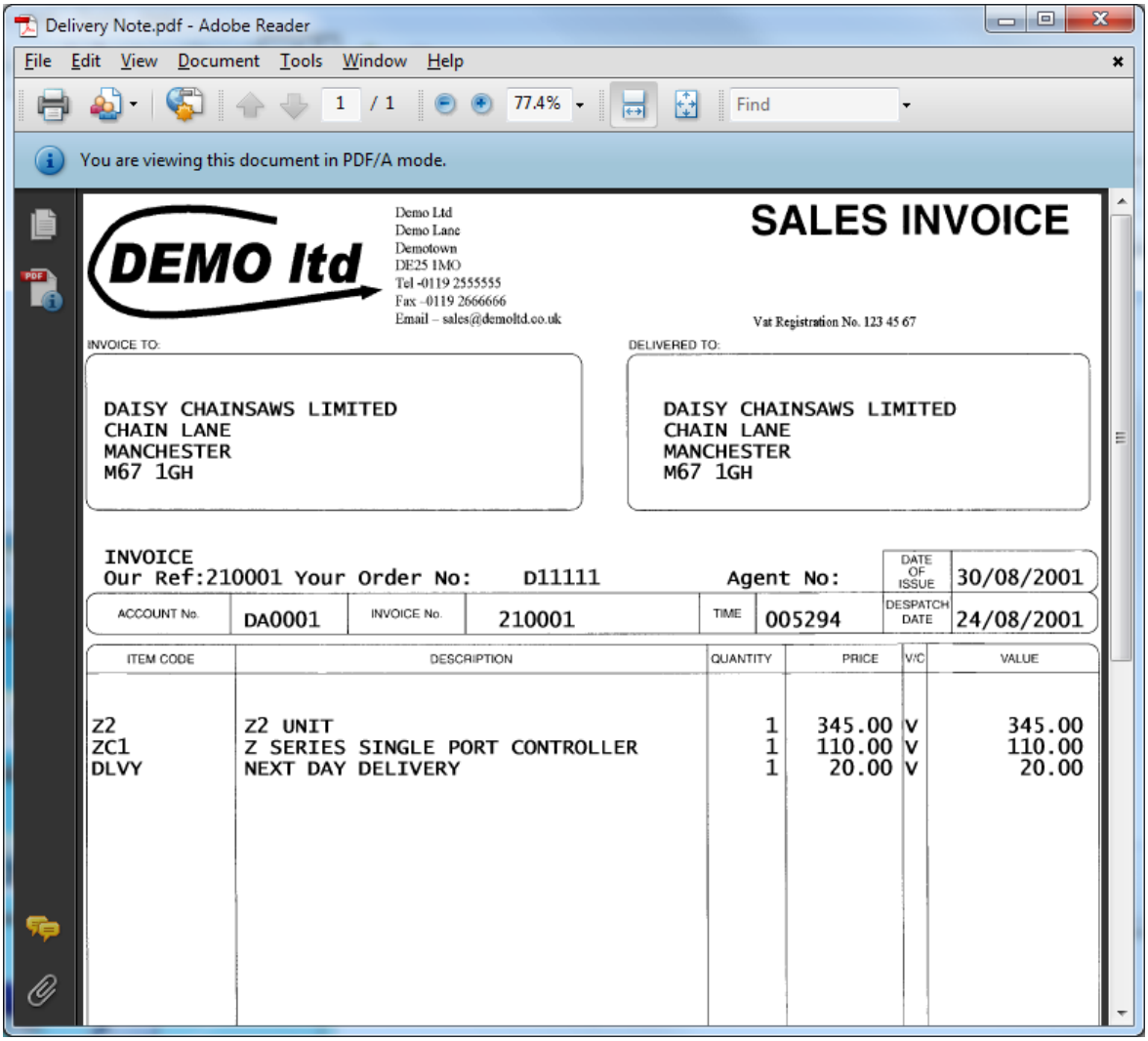

Figure 175

11.4.1 Advanced PDF Conversion Options

When exporting files to the Acrobat PDF format mstore offers a number of extended features to further tailor the exported PDF file to your requirements. The extended features are accessed from the File Format Conversions dialog in Figure 172. If you click the PDF tab you will be see the following options.

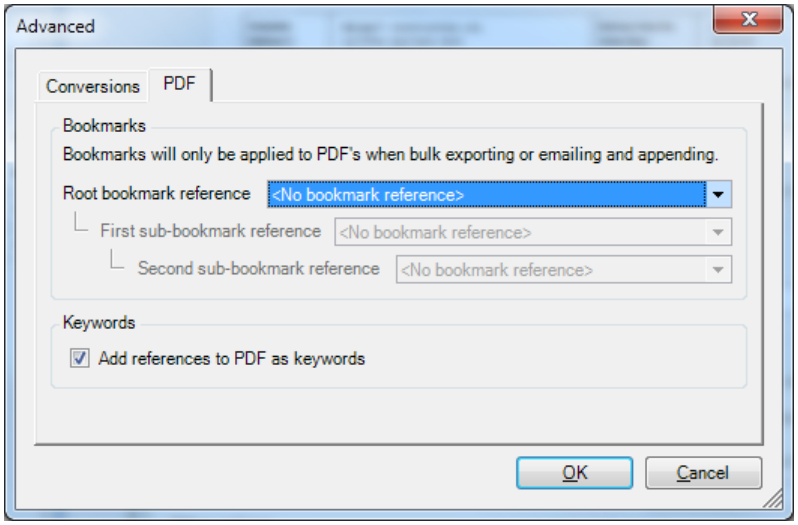

Figure 176

The Bookmark options are only available when bulk exporting documents (i.e. exporting more than one document at a time). When you export multiple documents to PDF the resulting output will consist of a single file, multi-document PDF file. By utilising the PDF bookmark option you can produce an easily-navigable PDF file where each document is a single click away.

As an example of this functionality, 2 PDF files have been selected. When we configure the advanced PDF options, the bookmarks section is now enabled. The bookmarks operate on a hierarchical basis where the documents in the PDF can cascade according to their respective reference values.

For this example the Customer Order Number will be used to bookmark the document (Figure 177), which is selected in the Root Bookmark Reference dropdown. When OK is clicked you are returned to the export dialog so that you can start the process. Click OK in the export options dialog and the PDF file will be created.

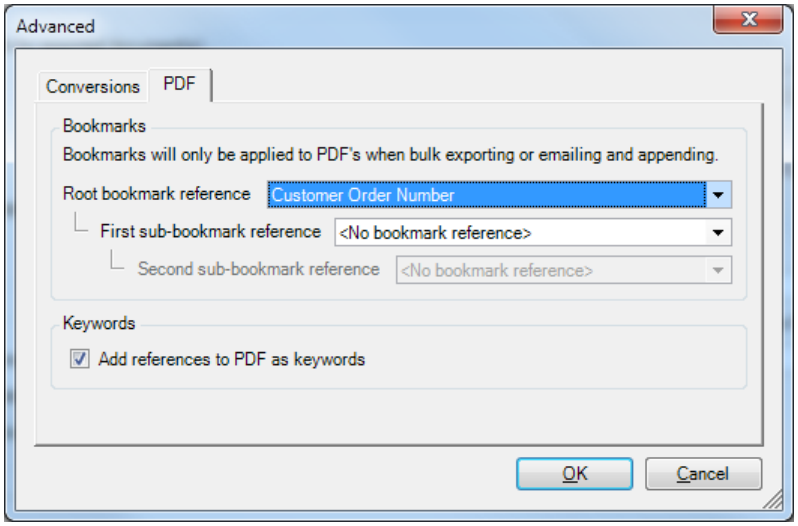

Figure 177

When you open the exported PDF file in Acrobat Reader, if you enable the bookmarks pane you will notice that there are now two bookmarks within the document (Figure 178).

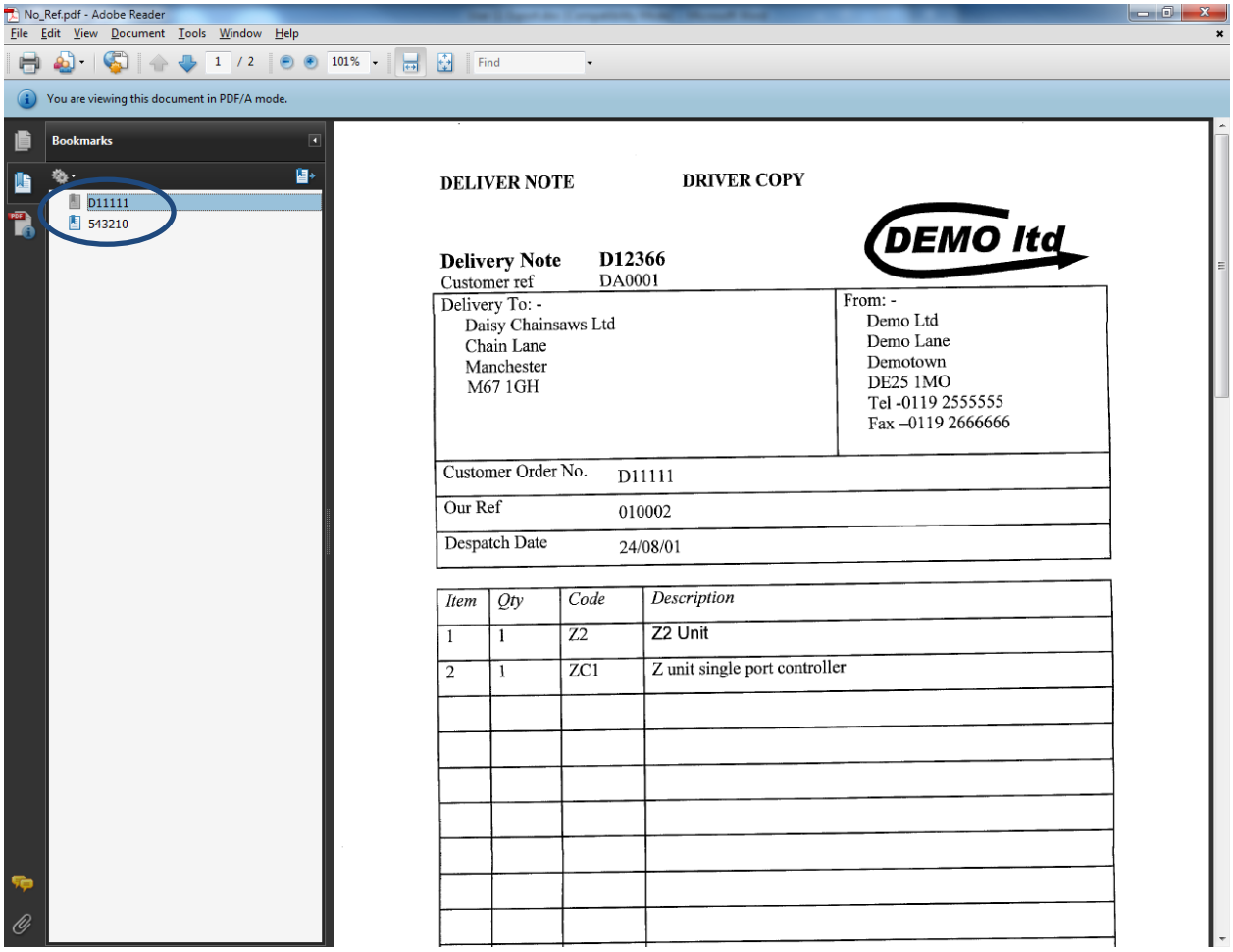

Figure 178

The Keywords option allows you to export the mstore document references to the PDF file. If this option is selected when you export a document to a PDF file, the Keywords property of the target PDF will be set to a delimited string of all the references for that document (Figure 179).

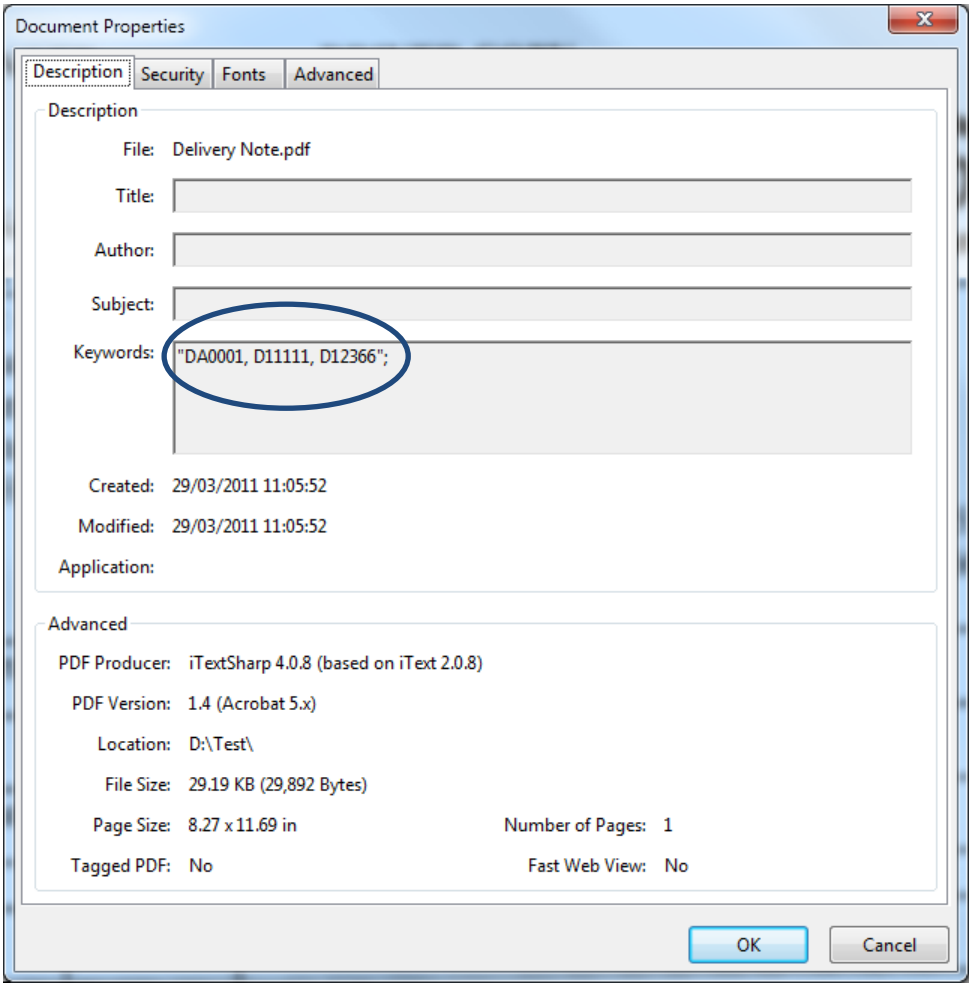
Document Properties
Description
Security
Fonts
Advanced
Description
File: Delivery Note.pdf
Title:
Author:
Subject:
Keywords: "DA0001, D11111, D12366";
Created: 29/03/2011 11:05:52
Modified: 29/03/2011 11:05:52
Application:
Advanced
PDF Producer: iTextSharp 4.0.8 (based on iText 2.0.8)
PDF Version: 1.4 (Acrobat 5.x)
Location: D:\Test\
File Size: 29.19 KB (29,892 Bytes)
Page Size: 8.27 x 11.69 in
Number of Pages: 1
Tagged PDF: No
Fast Web View: No
OK
Cancel

Figure 179

12 Printing

12.1 What's in this chapter?

Printing is only available if there is at least one printer configured on the machine. Depending on the file type you wish to print you can,

- Print or Print Preview documents
- Print with or without annotations
- Print with or without endorsements
- Print and delete from mstore at the same time
- Configure printer settings
- Specify a range of pages to print
- Specify how many copies to print
- Specify how to collate the copies

This chapter will explain,

- Printing and previewing a document
- Supported file types
- Printing types
- Office Printing
- Printing
- Print Preview
- Web Printing
- Printing
- Print Preview
- Image Printing, Text Printing, Acrobat Printing & Basic Printing
- Configuring the printer
- Setting the options
- Setting the pages
- Setting the copies
- Collation

12.2 Printing and previewing a document

You will be able to print an mstore document from nearly all mstore forms where you can view a document. To print a document select File → Print, or click on the Print button on the toolbar, to print preview a document select File → Print Preview. (Figure 180, Figure 181)

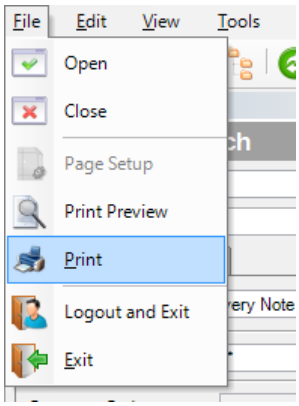

Figure 180

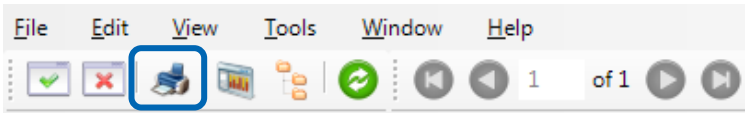

Figure 181

You will then usually see a print dialog allowing you to configure the options available for the Print Preview or Print. However depending on the file type depends how mstore will handle the printing.

12.2.1 Supported file types

The following lists show which file types fall under which printing types, this determines how mstore will attempt to print or print preview the document.

Office Printing

- .doc
- .docx
- .xls
- .xlsx
- .ppt
- .pptx

Image Printing

- .tif

Arena Group

- .jpg
- .gif
- .png

Text Printing

- .txt
- .rtf
- .ini
- .xml

Web Printing

- .html
- .htm
- .mht

Acrobat Printing

- .pdf

Basic Printing

- .msg
- Any other file types

Not Supported

If a file type is not supported by the printing sub-system, a message box will be displayed informing you of the fact. Examples of these file types would be:

- WAVE audio (*.wav)
- MPEG Layer 3 Track (*.mp3)
- Windows Audio Video Interleve (*.avi)

12.2.2 Printing types

The following table shows the types of print configuration options which are available for the various document file types that can be indexed to mstore.

	Print	Preview	Set Printer Settings	Notes
Office Printing	✓	✓	✓	Uses the printing available within your version of Microsoft Office.
Image Printing	✓	✓	✓	Uses mstore printing and previewing methods.
Text Printing	✓	✓	✓	Uses mstore printing and previewing methods.
Web Printing	✓	✓	✓	Uses the printing available within your version of Internet Explorer.
Acrobat Printing	✓	✘	✓	Doesn't permit previewing but most other print features available.
Basic Printing	✓	✘	✘	Windows performs a basic print to the default system printer using the default settings.

12.4 Office Printing

12.4.1 Printing

When clicking print the Office Print Dialog will appear, here you will have all the features available that you have when printing from Office (Figure 182).

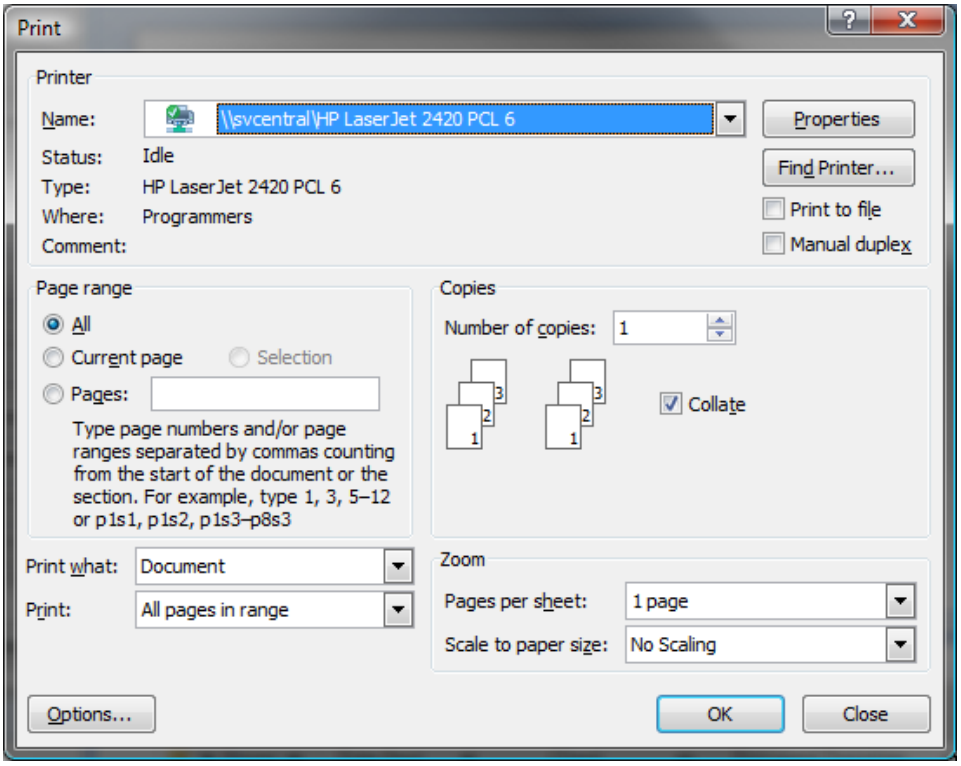

Figure 182

12.4.2 Print Preview

Print Preview will put the document in print preview mode giving you the same options as in Office (Figure 183).

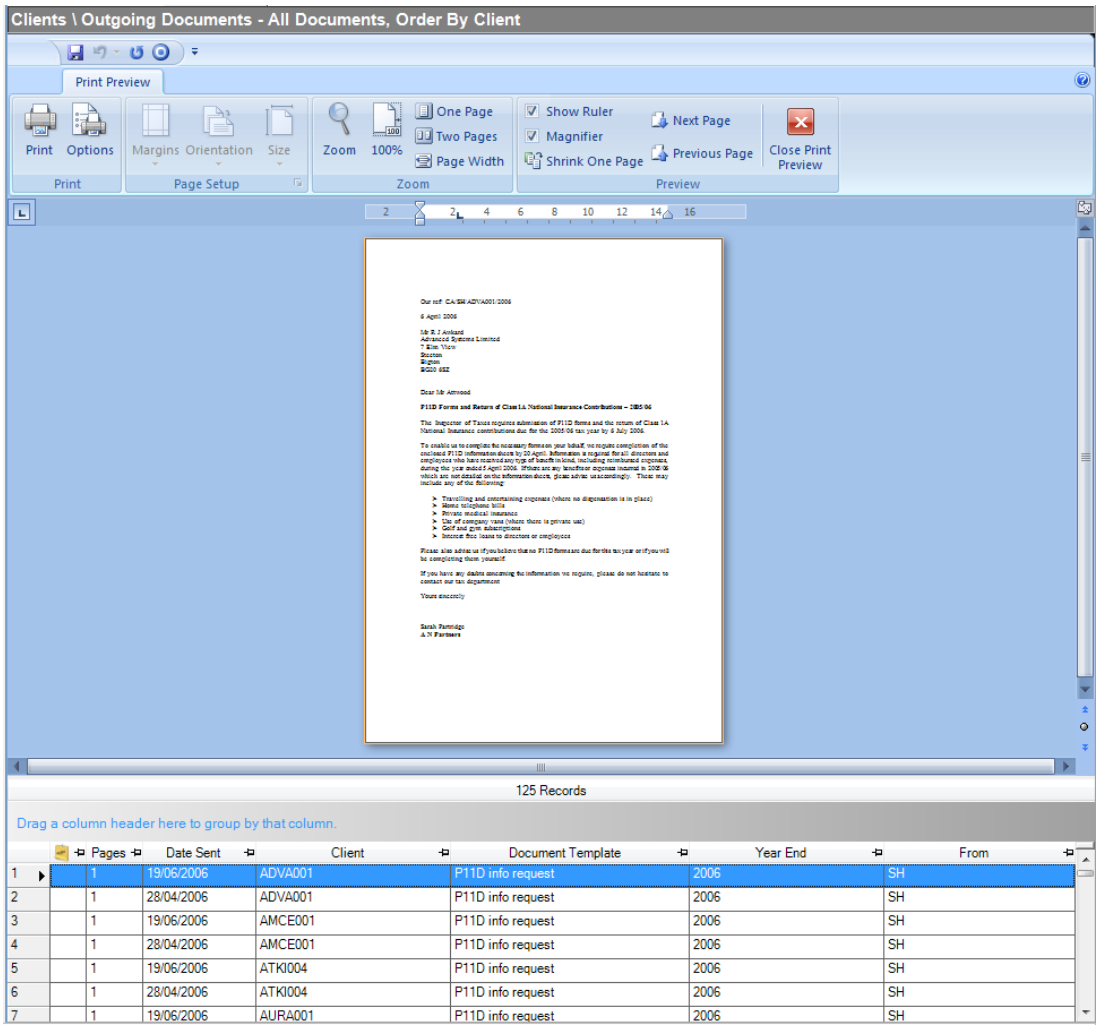

Figure 183

12.5 Web Printing

12.5.1 Printing

When clicking print the Internet Explorer Print Dialog will appear, here you will have all the features available that you have when printing from Internet Explorer (Figure 184).

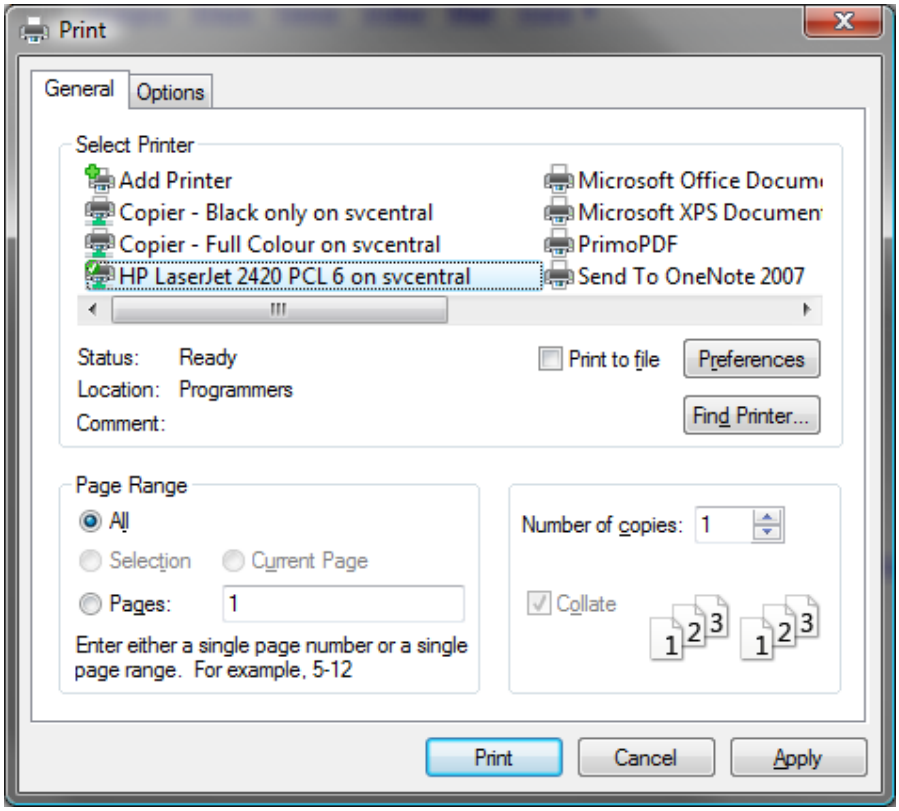

Figure 184

12.5.2 Print Preview

Print Preview will open up a new print preview window, the same as in Internet Explorer (Figure 185).

NOTE
The actual appearance of this window will differ according to the version of Internet Explorer that you have installed. There may be subtle differences between the different versions of the program.

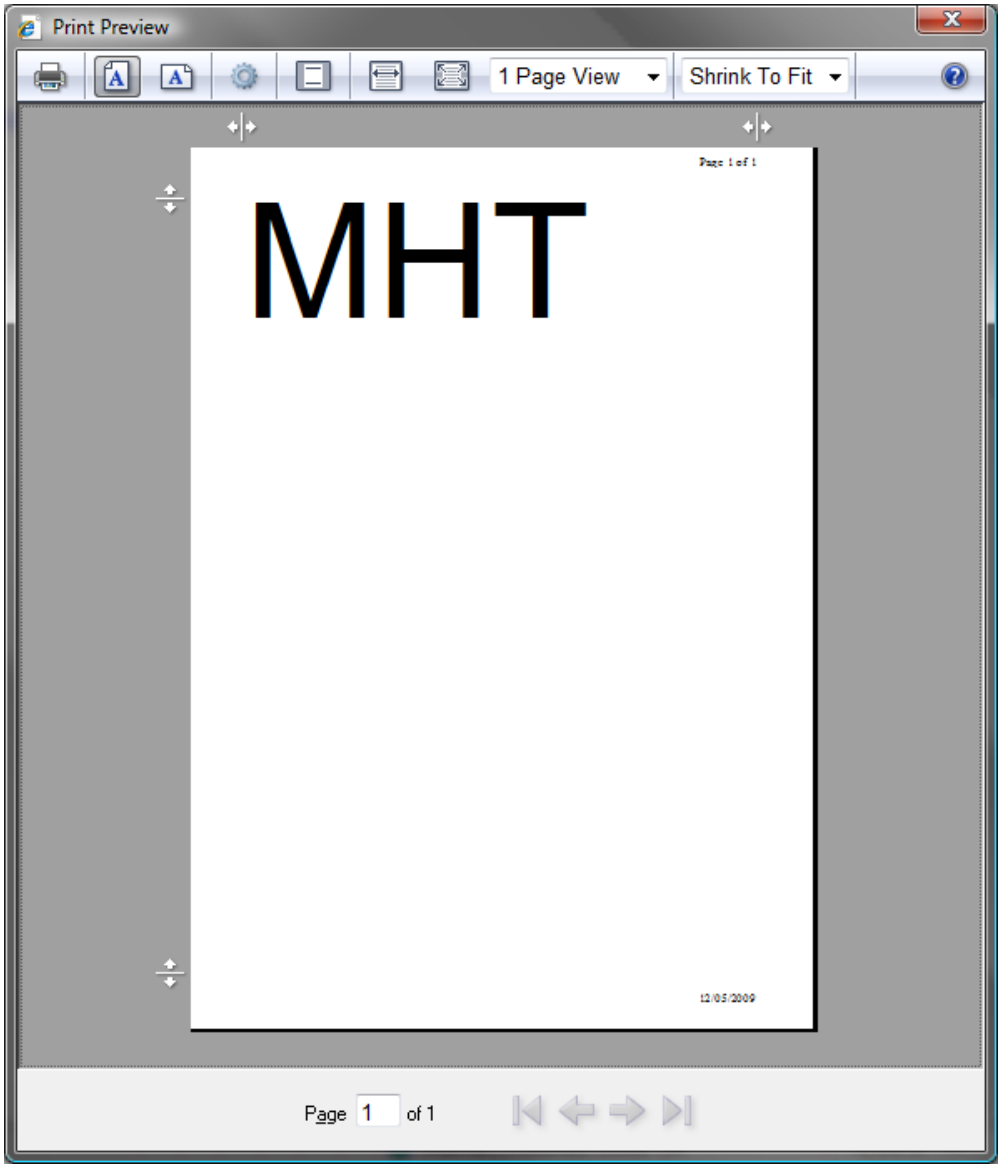

Figure 185

12.6 Image Printing, Text Printing, Acrobat Printing & Basic Printing

Setting	Description
Image Printing	All options are enabled.
Text Printing	Page options are disabled and collation unavailable.
Acrobat Printing	All print options are available with the exception of the '**Current Page**' option under **Page Options**.
Basic Printing	Only 'Copies' and 'Delete document(s) from mstore afterwards' are enabled.

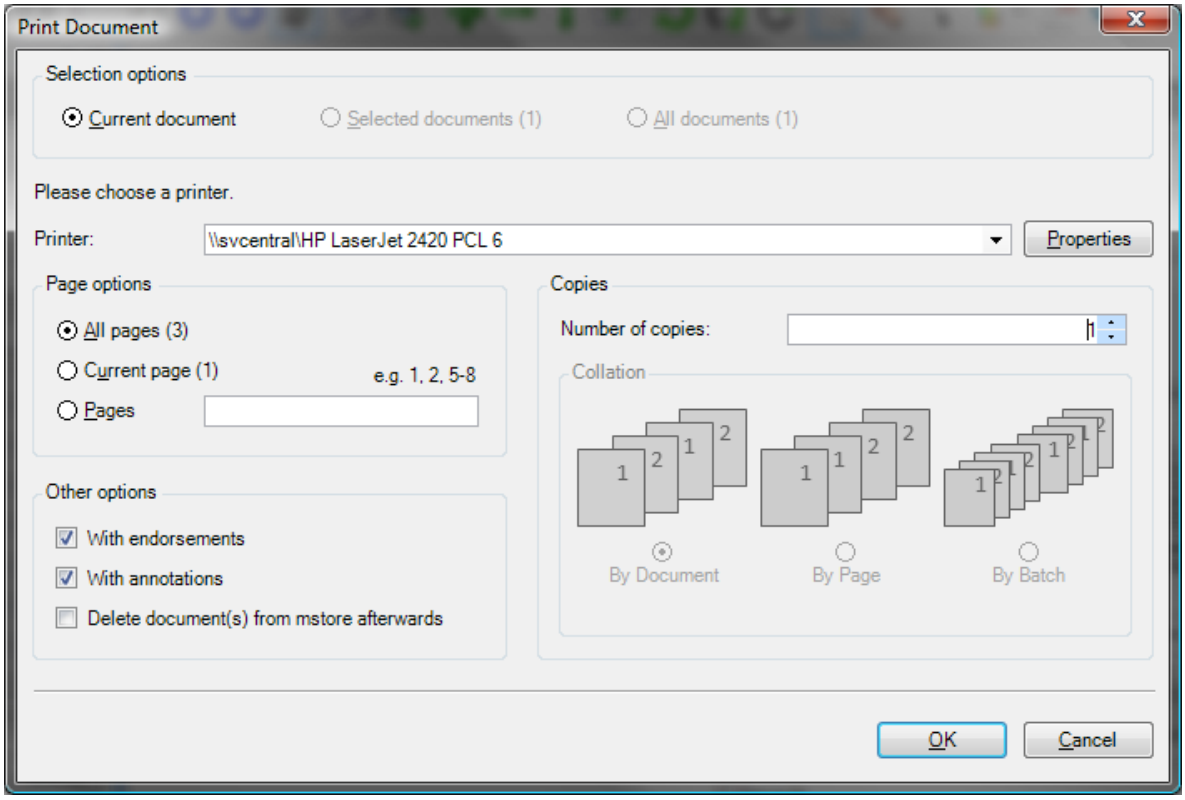

Figure 186

12.6.1 Configuring the printer

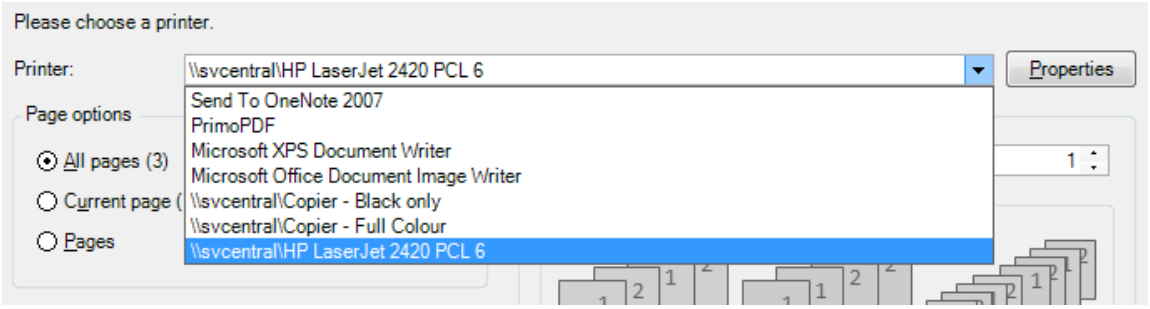

Figure 187

By clicking on the printer drop down you will be given a list of available printers to choose from (Figure 187). By selecting a printer and clicking properties you will be able to set the printer settings (Figure 188).

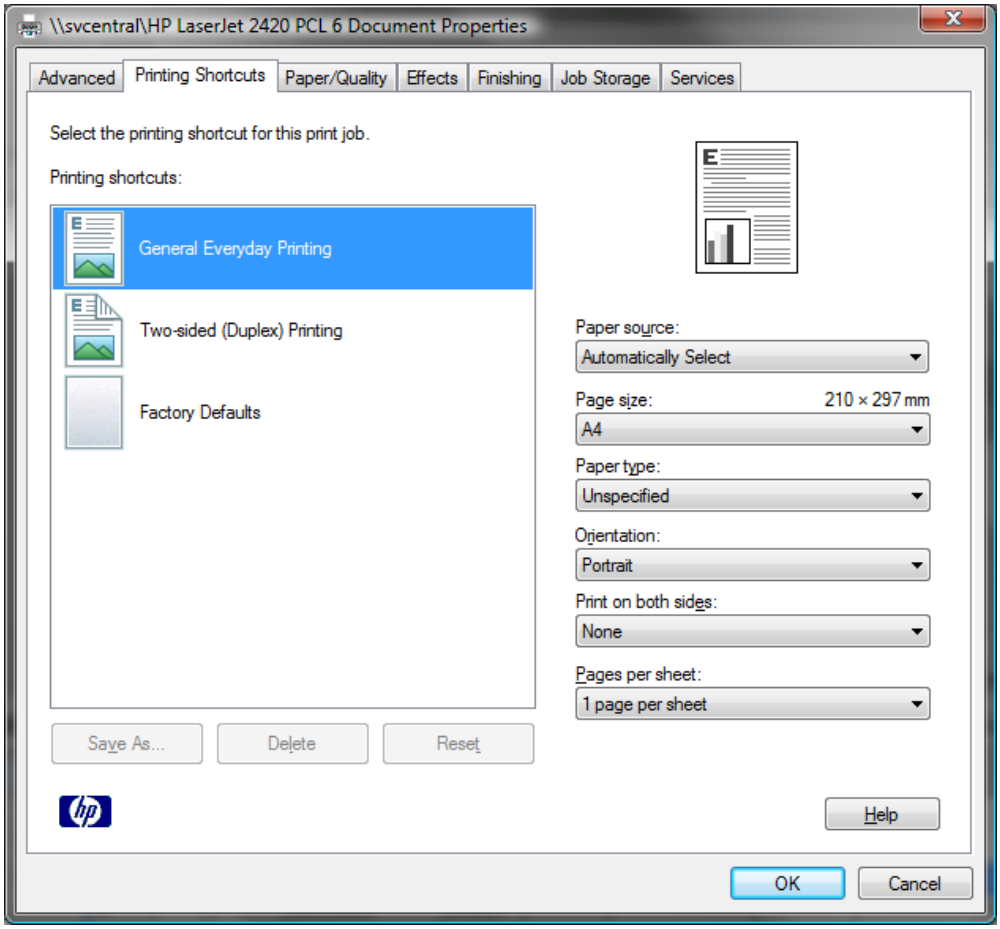

Figure 188

12.6.2 Setting the options

Figure 189

Setting	Description
With Endorsements	Prints endorsements if checked.
With Annotations	Prints annotations if checked.
Delete Document(s) from mstore afterwards	If checked the document will be deleted after printing.

12.6.3 Setting the pages

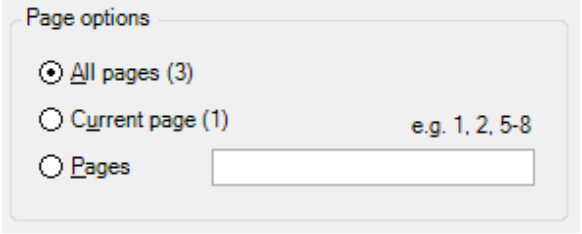

Figure 190

Setting	Description
All Pages (x)	Prints all the pages in the document (number of pages shown in brackets).
Current Page (x)	Prints the page that is currently being viewed (page number shown in brackets).
Pages	Allows entry of a ‘range’ of pages to print (e.g. 1,2,5-8).

12.6.4 Setting the copies

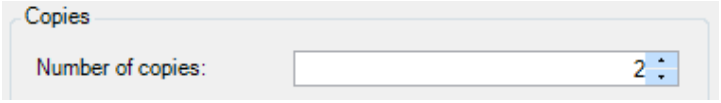

Figure 191

You can print up to 99 copies of the document, however if you print above 5 copies you will be asked to confirm.

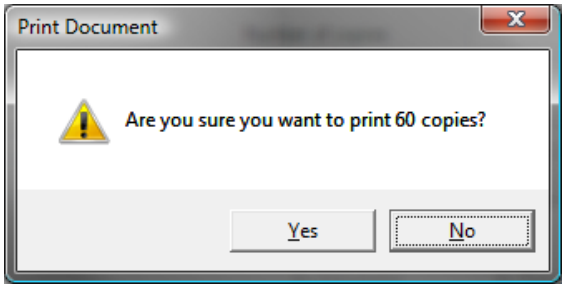

Figure 192

12.6.5 Collation

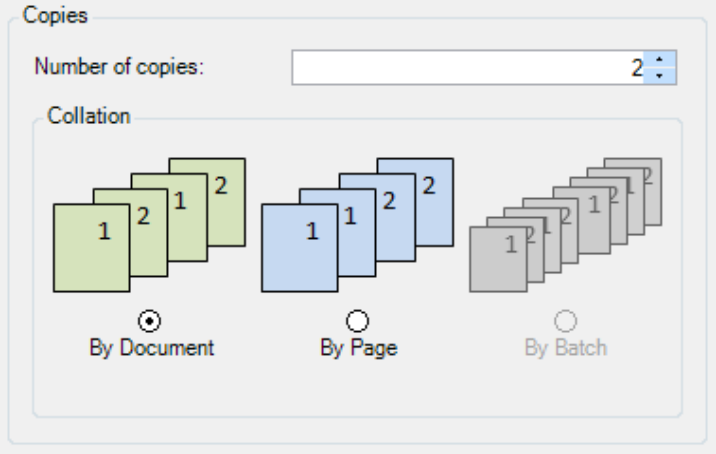

Figure 193

13 Tasks Guide

13.1 What's in this chapter

mstore Tasks are an easy to use method of requesting a user to interact with a document. Tasks are created for documents and alert users along a chain with a message of what they have to do, the user then reports their actions to the task and either completes it or re-assigns it and passes it to another user. An administrator can use the task feeder to automatically create tasks for document types when documents are indexed or re-indexed to them.

An example of a task is when a purchase invoice is indexed into mstore it will need to be checked that the invoice is correct with whomever ordered it. This guide will follow through this example.

With mstore you can:-

- Create a task for a document
- Automatically create tasks for document types
- Complete and re-assign tasks
- Monitor tasks which you own or tasks assigned to you

This chapter will explain,

- Accessing the tasks module
- Creating a task for a document
- Viewing tasks assigned to me
- Re-assigning a task
- Doing actions on tasks
- Completing tasks

13.2 Accessing the tasks module

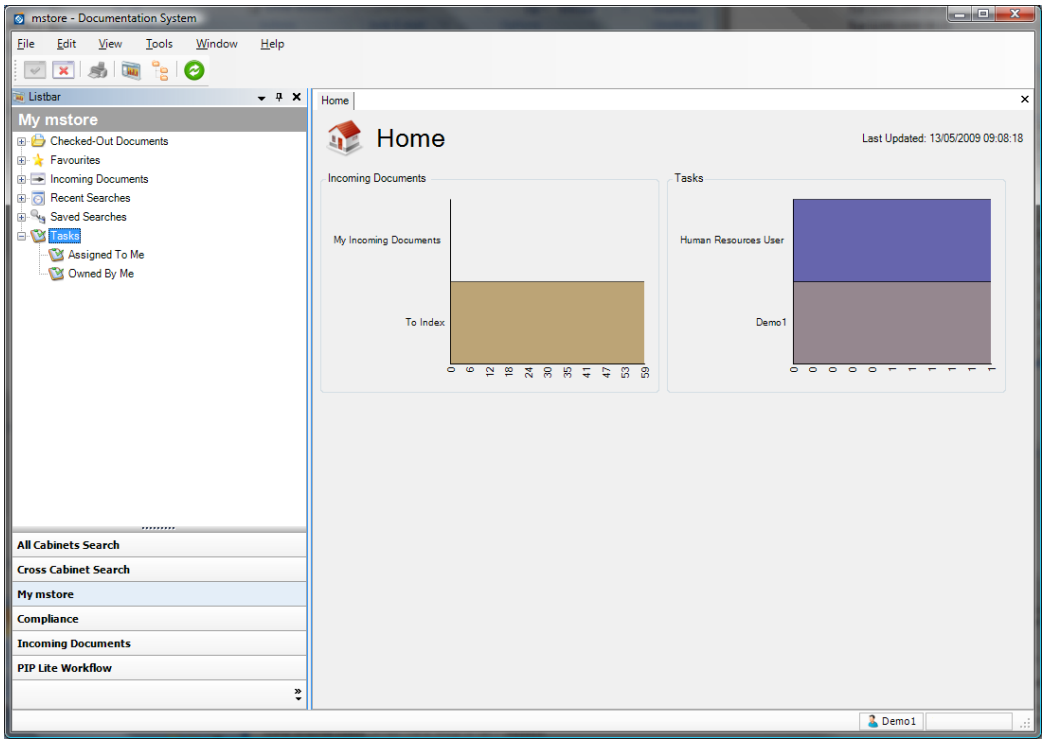

Figure 194

You can access the task module through My mstore (Figure 194).

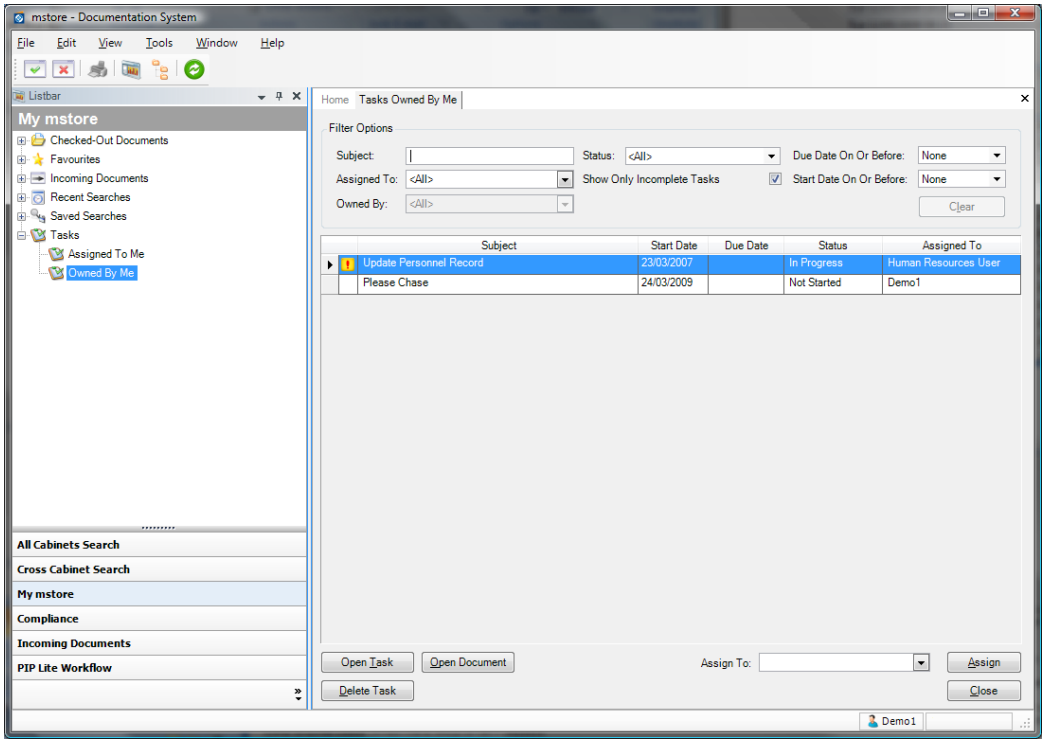

Figure 195

From here you can either show the tasks '**Assigned To Me**' or '**Owned By Me**'. Clicking on one of these items will open the Tasks module in a new tab (Figure 195).

13.3 Creating a task for a document

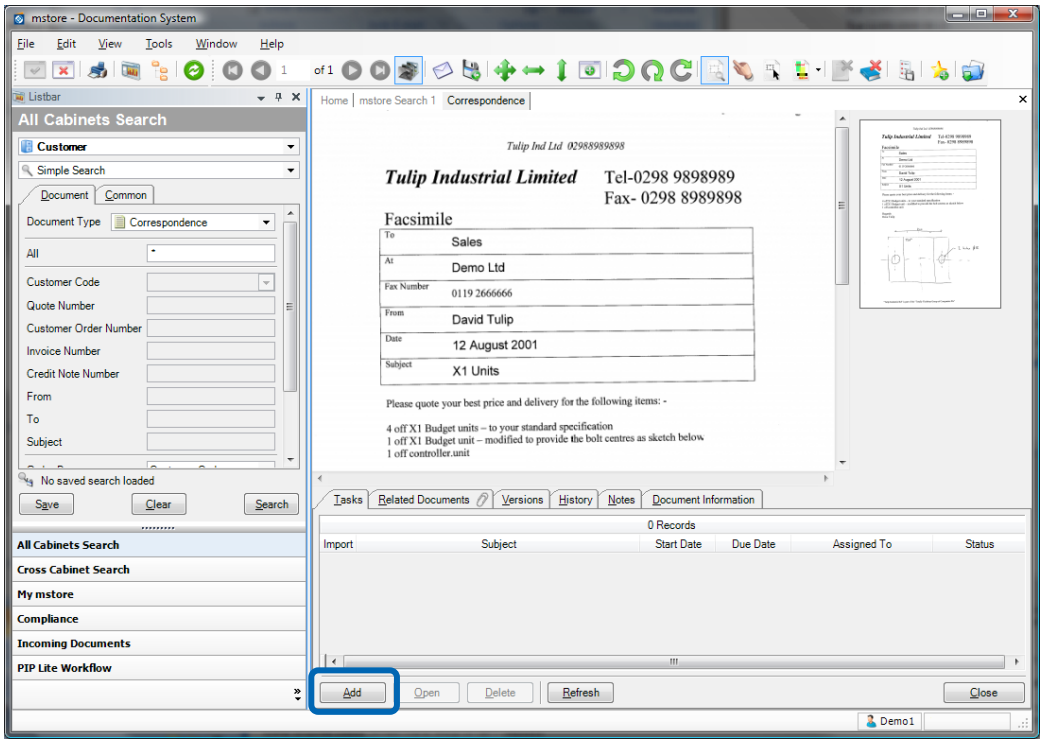

Figure 196

As an example Demo1 has indexed a purchase invoice and needs to confirm with Russell that it is what was ordered.

To create a task for the document you must first open the document, go to the **Tasks** tab and click on **Add** (Figure 196).

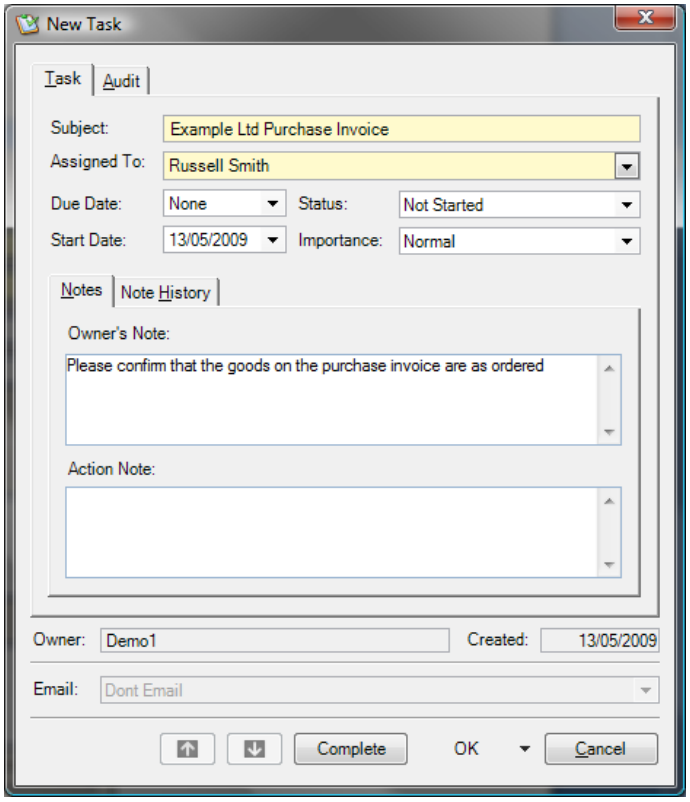

Figure 197

The details in Figure 197 show the task Demo1 wants to create. The subject is the name of the task, it is called “Example Ltd Purchase Invoice” so that Russell will identify the task easier.

Assigned To has been changed to Russell so he will be able to see the task. It is only a small task and not that important so the **Due Date** and **Importance** have been left at there defaults. Because it has just been invoiced the **Start Date** is left at the default (today’s date) as well.

The **Owner’s Note** is the message that will describe the task and the action which the owner wishes to be carried out. The **Action Note** has been left blank because Sandra has not done anything as part of this task apart from creating it. This is also why the **Status** has been left at 'Not Started'. Other options for status are shown in Figure 198.

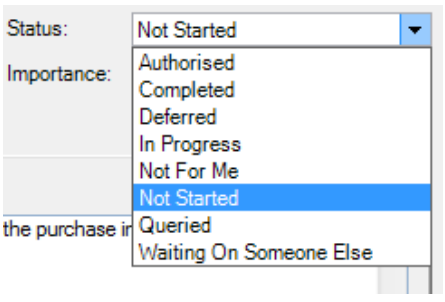

Figure 198

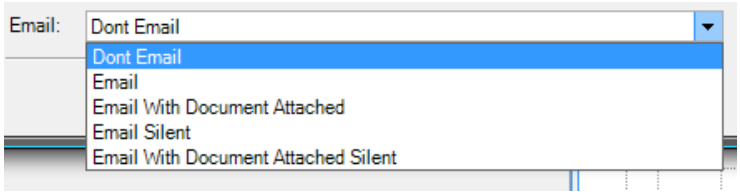

Figure 199

Figure 199 shows a list of email options for the document after the task has been created. The options that send emails are only available if the Assigned To user has an email setup in User Maintenance.

Email Option	Description
Don't Email	No email will be sent when the task is created.
Email	A new email window will pop up with a default template. This can be altered before sending to the recipient.
Email With Document Attached	A new email window will pop up with a default template, and the document attached to it. This can be altered before sending to the recipient.
Email Silent	Same as the 'Email' option, but the email is transmitted automatically without displaying it to the task creator.
Email With Document Attached Silent	Same as the 'Email With Document Attached' option, but the email is transmitted automatically without display it to the task creator.

To create the task click **OK**.

13.4 Viewing tasks assigned to me

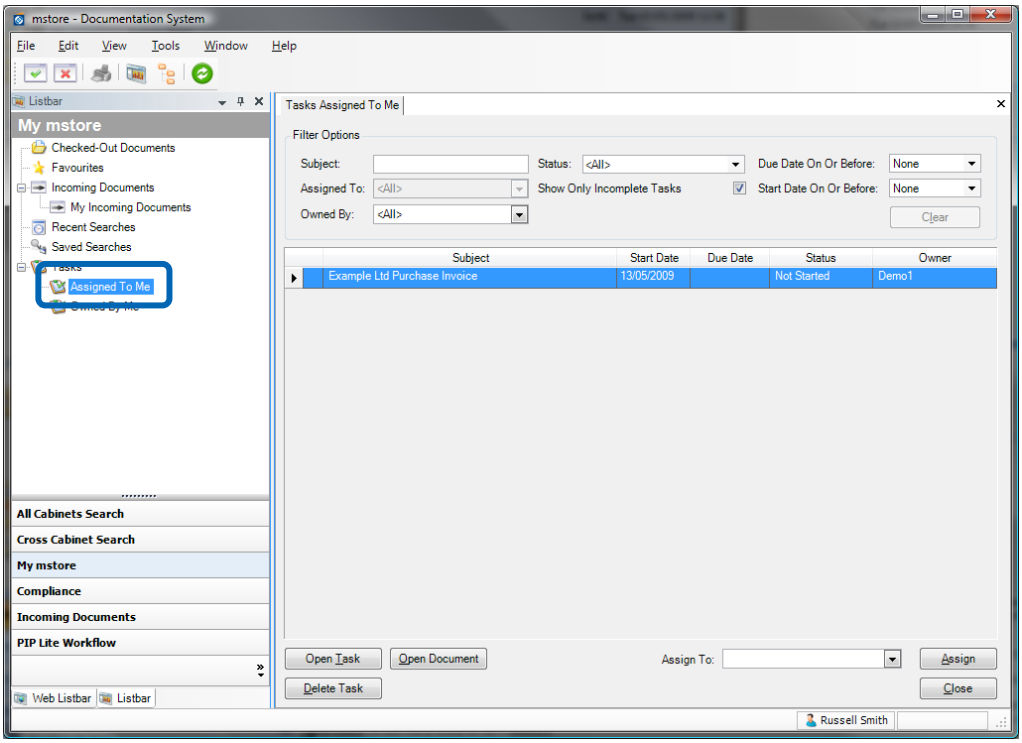

Figure 200

Russell has now been assigned the task, so to see it he will need to access the tasks assigned to him.

In My mstore click on '**Assigned To Me**' (Figure 200) under '**Tasks**'.

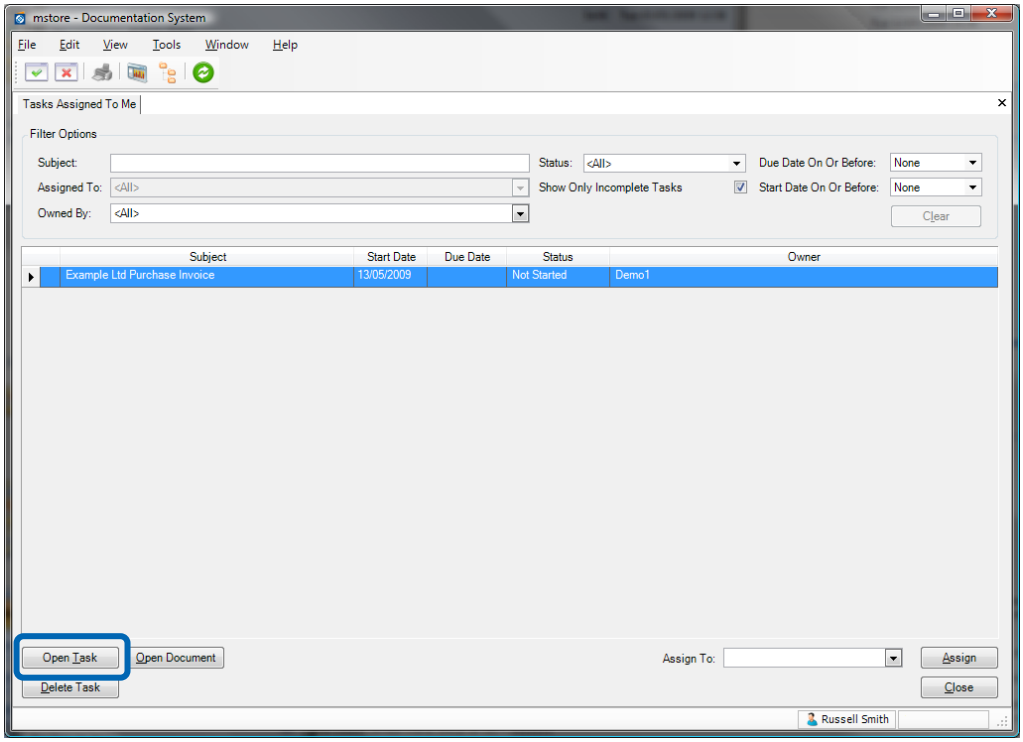

Figure 201

In Figure 201 Russell can see all the Tasks that have been assigned to him, in Filter Options he can filter out the tasks by status, due and start date, owner and subject.

To view the task he needs to select it in the list and click **Open Task**.

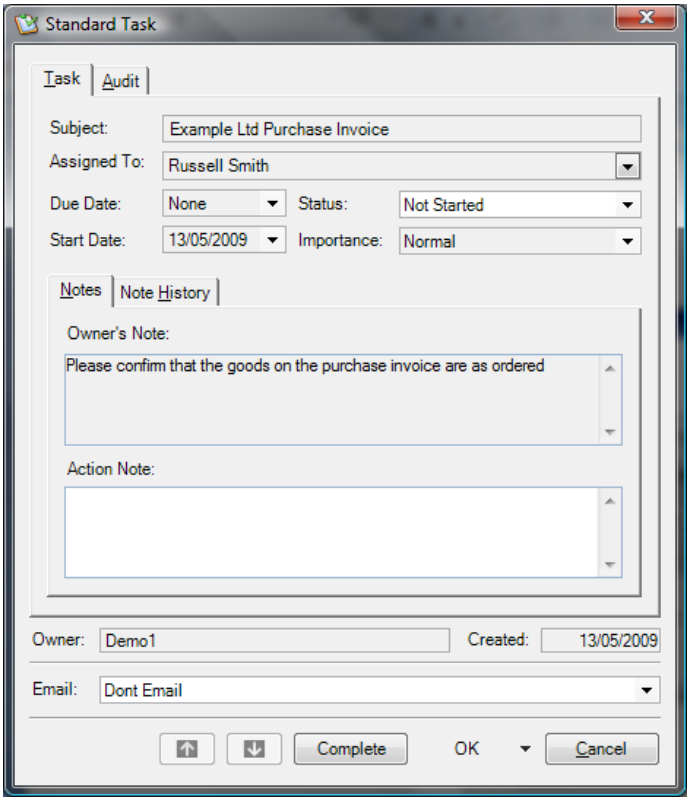

Figure 202

He will now be able to see the task which has been created.

Because he needs to confirm the goods on a purchase invoice he also needs to view the document the task is attached to.

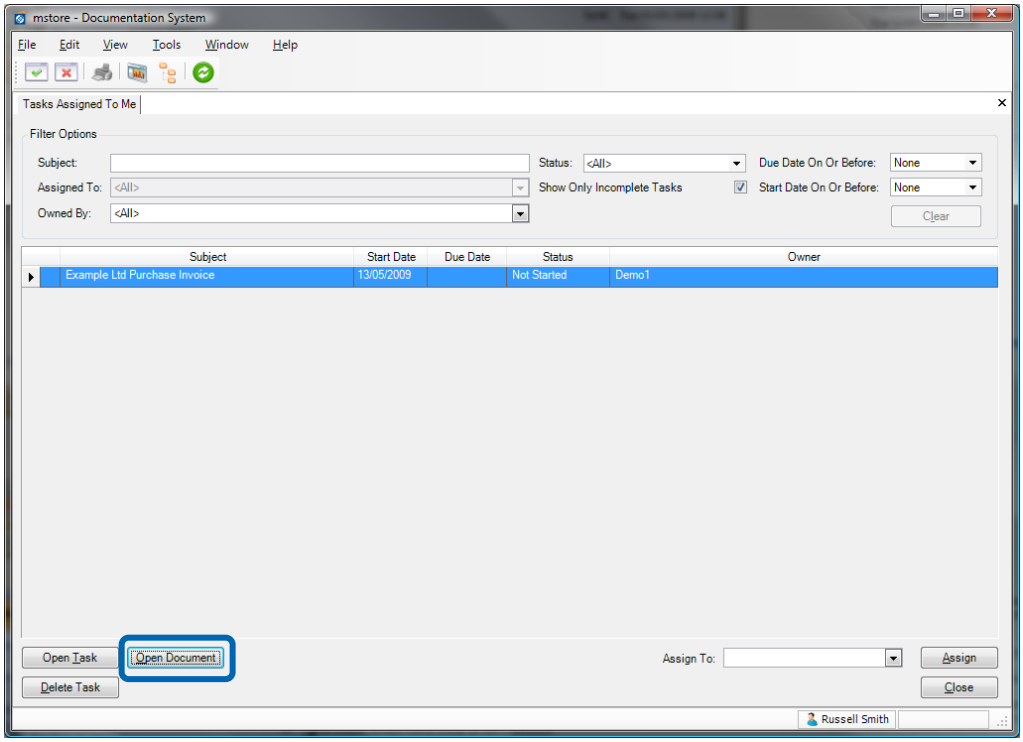

Figure 203

In the '**Tasks Assigned To Me**' tab, click on the task and then click '**Open Document**' (Figure 203) to open the document in a new tab with the tasks section open and the current task selected (Figure 204).

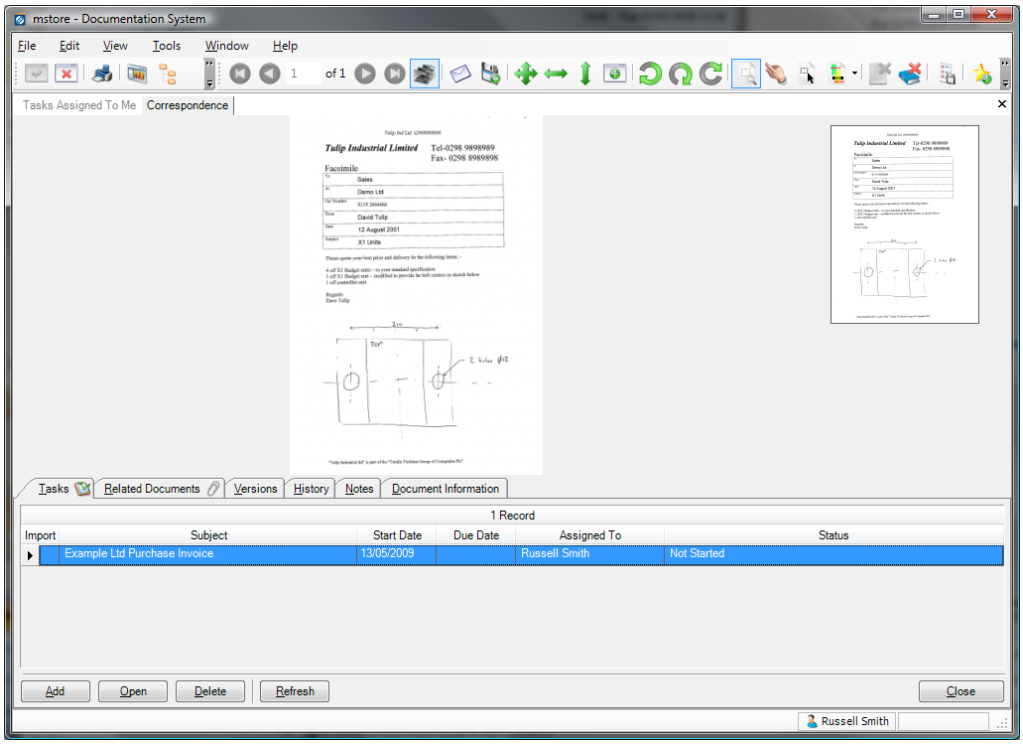

Figure 204

The icon on the tasks bar will appear when there are incomplete tasks assigned to you on the document being viewed.

13.5 Re-assigning a task

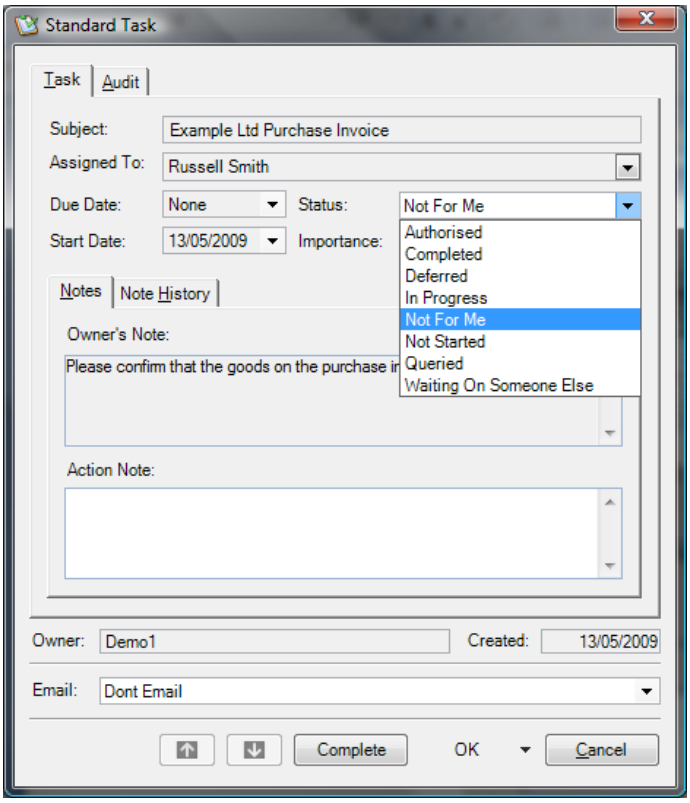

Figure 205

Russell has now looked at the purchase invoice and sees that it is Kevin who has ordered the goods. He first opens the task (Figure 205) and then selects the status as '**Not For Me**' and clicks '**OK**'. This means that the audit will show that Russell changed the status to '**Not For Me**'.

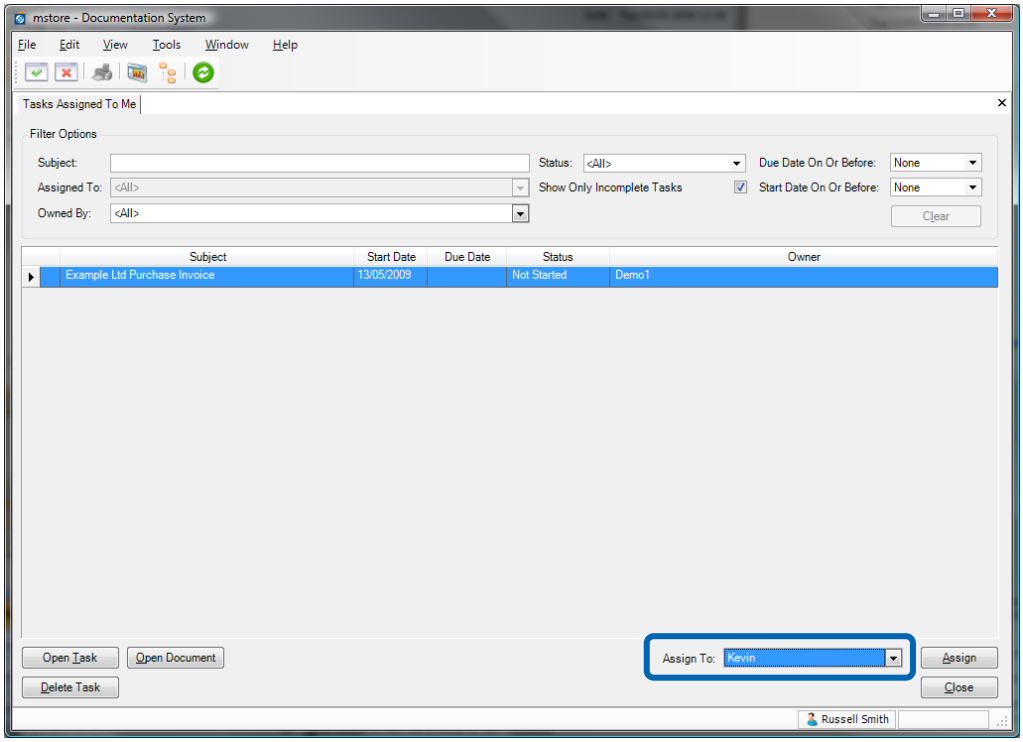

Figure 206

In the 'Tasks Assigned To Me' tab (Figure 206), he needs to select 'Kevin' in the '**Assign To**' box, and click 'Assign' to pass the task on to Kevin. It will now be removed from Russell's list of tasks assigned to him.

13.6 Doing actions on tasks

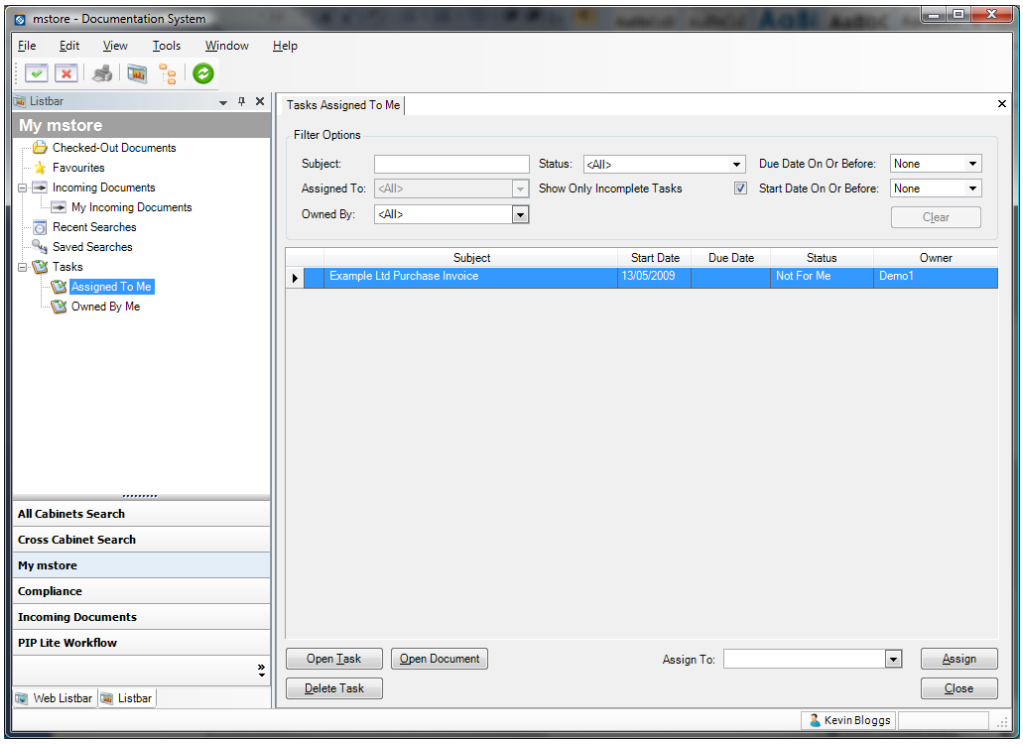

Figure 207

When Kevin looks at his '**Tasks Assigned To Me**' tab, he will see the task that has just been re-assigned to him (Figure 207) and be able to open it up to view it (Figure 208).

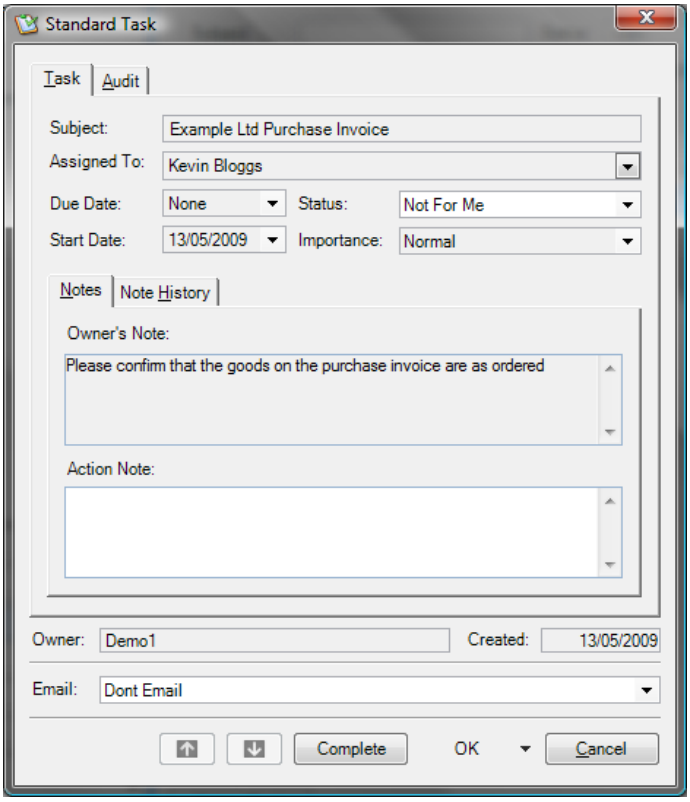

Figure 208

From here he can also view the history of the task to see what has happened to it.

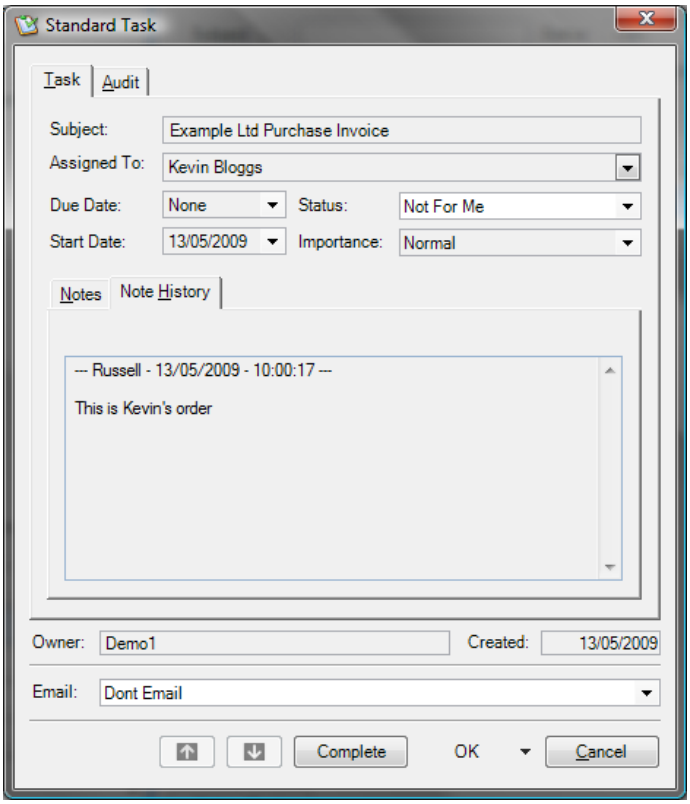

Figure 209

By clicking on **Note History** (Figure 209) he can see the note that Russell added to show it was Kevin's order (you will be shown how to add the note further on).

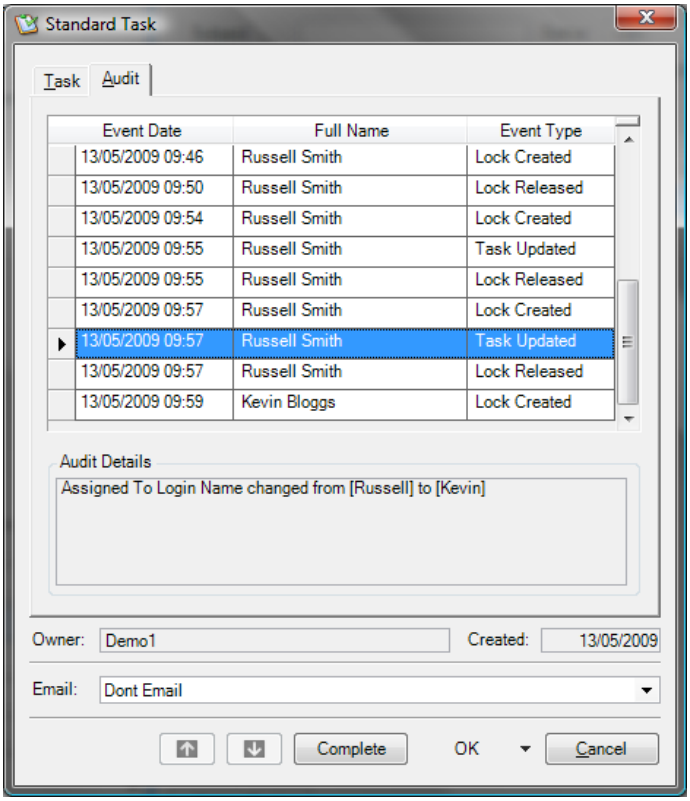

Figure 210

He can also see the **Audit** trail describing the changes to the task, such as it being reassigned, created and the status changes, etc (Figure 210).

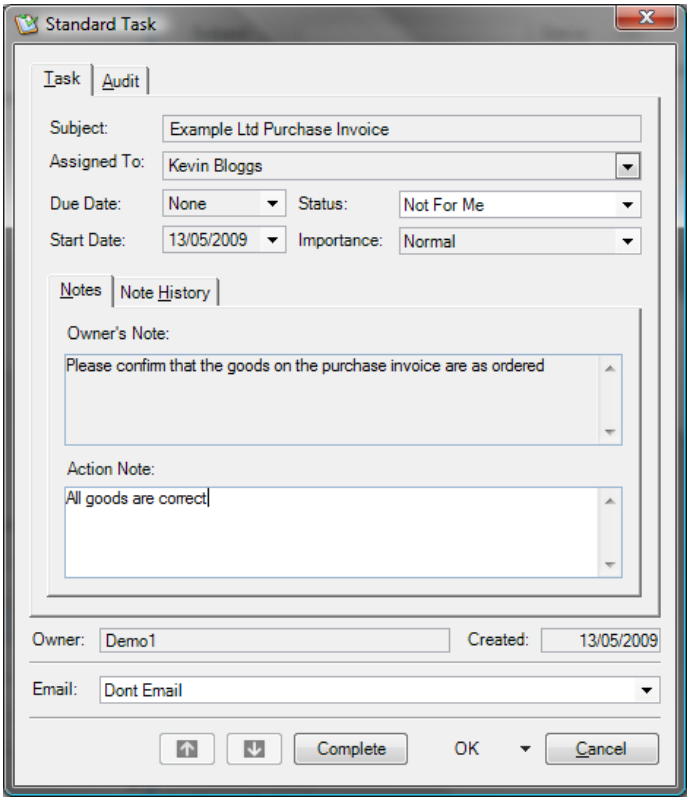

Figure 211

Back on notes (Figure 211) Kevin can add an action to show that he has checked the purchase invoice, to do this enter an action note describing the action and click OK (or Complete which will be described next).

13.7 Completing tasks

You can complete a task by clicking ‘Complete’ or by changing the status to ‘Completed’ and clicking ‘OK’.

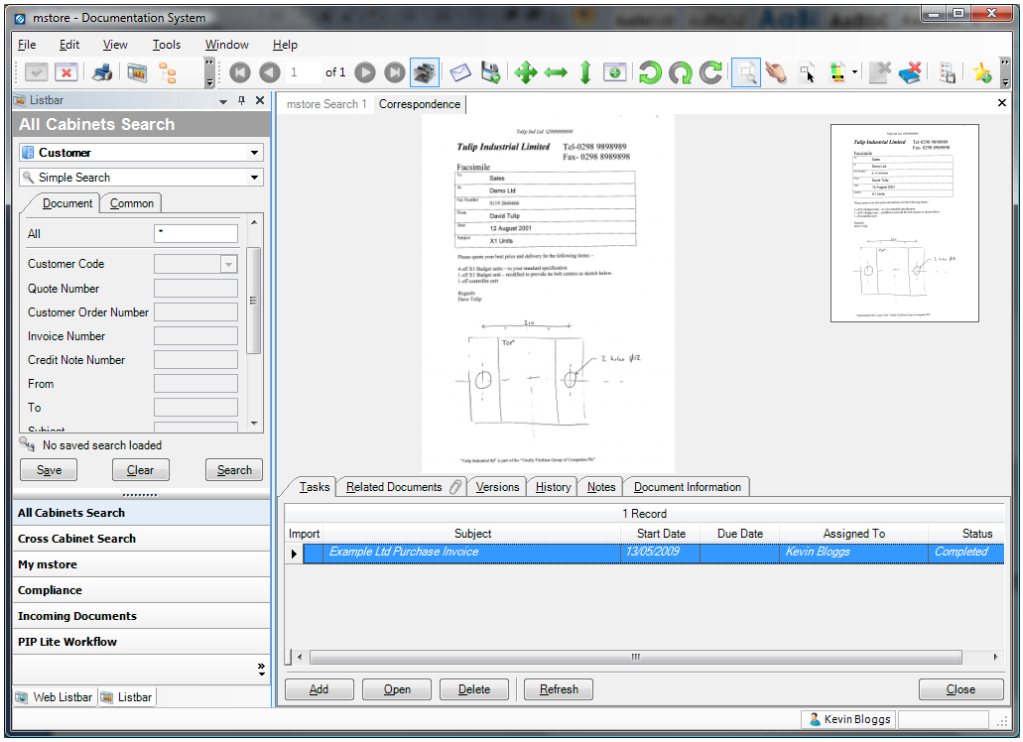

Figure 212

When Kevin has completed the task the status will be changed to ‘Completed’ (Figure 212), and the text will be in italics. It will also not be visible in his '**Assigned To Me**' tab.

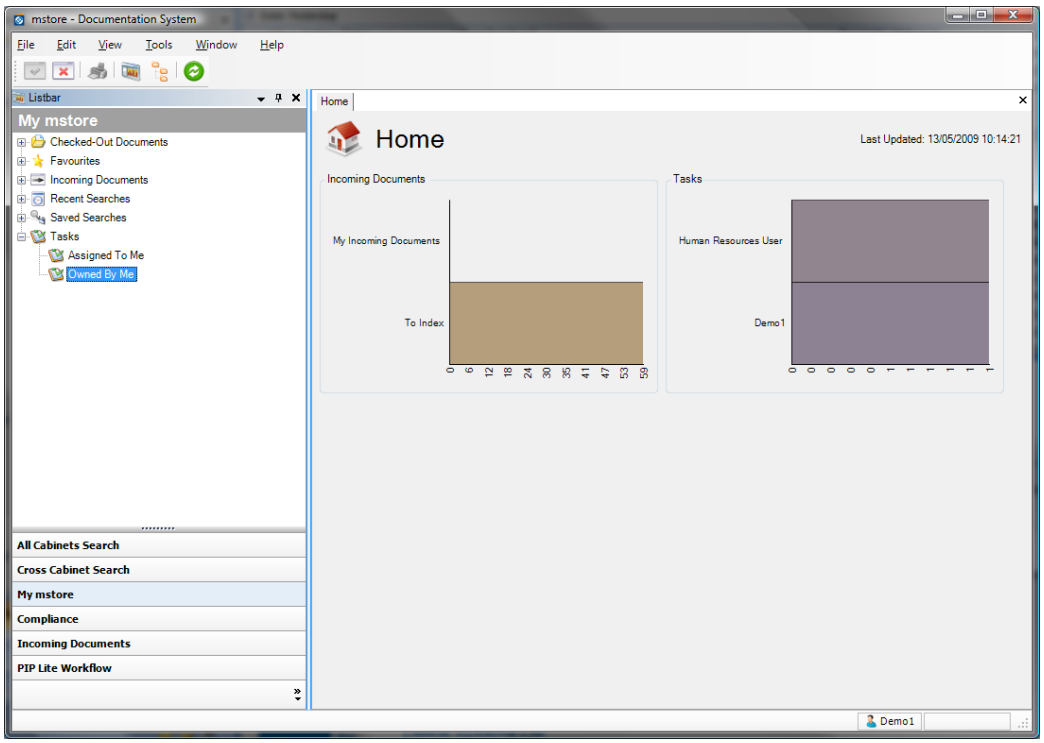

Figure 213

When Demo1 goes to view the tasks which he owns by clicking on '**Owned By Me**' (Figure 213).

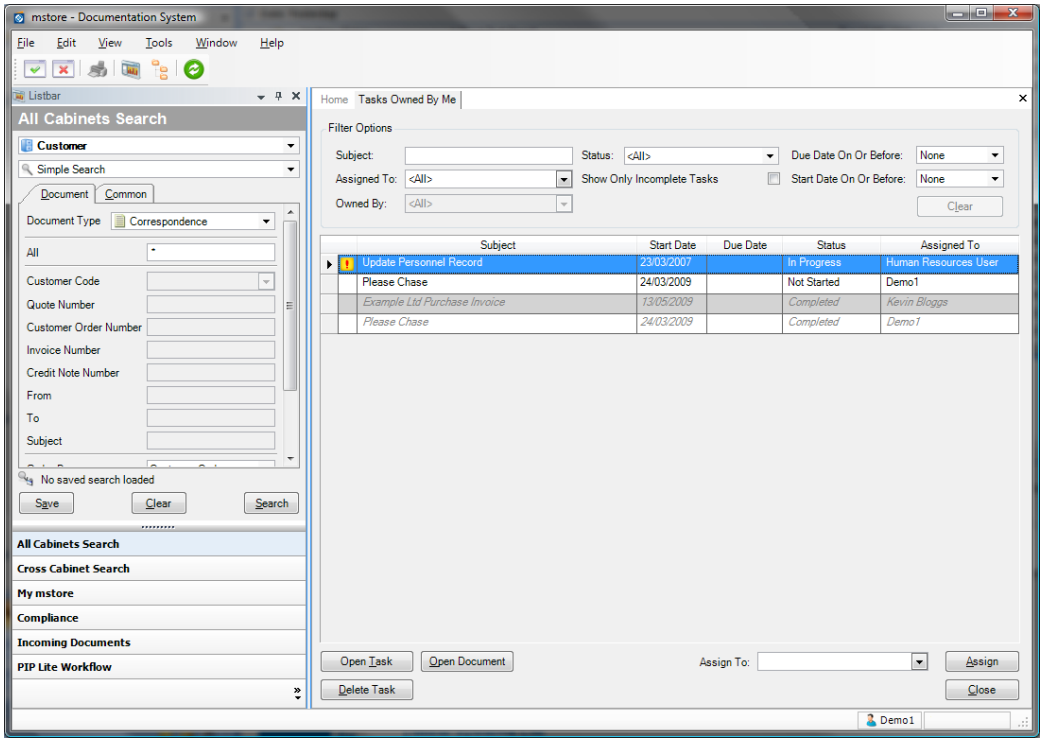

Figure 214

When viewing the tasks he will have to un-select ‘Show Only Incomplete Tasks’ to see the completed task. He can now open the task and view the **Notes History** (Figure 215) or the **Audit** (Figure 216) or click on ‘Delete Task’ to remove it from the list.

Completed tasks can be kept to keep a record of what tasks have been performed; it is up to the owner of the task.

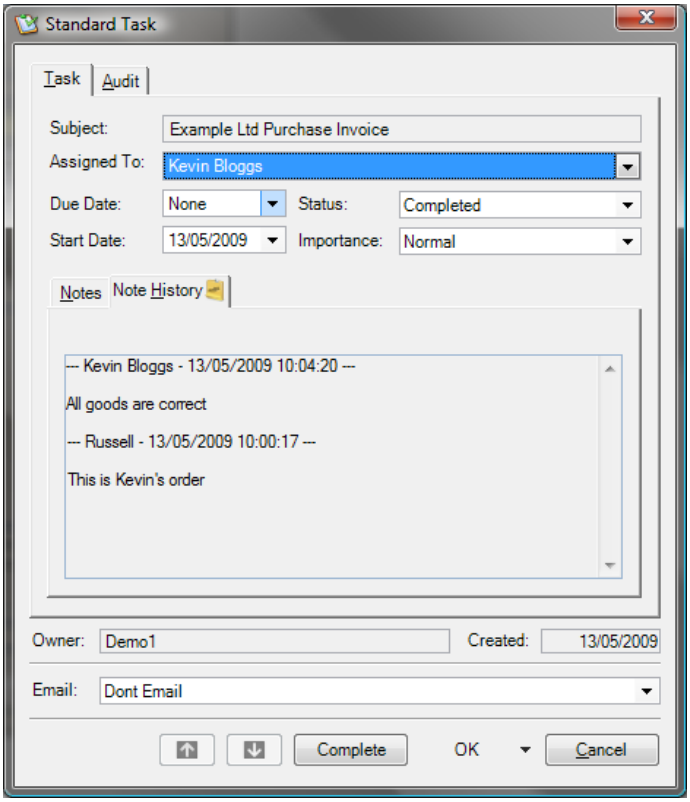

Figure 215

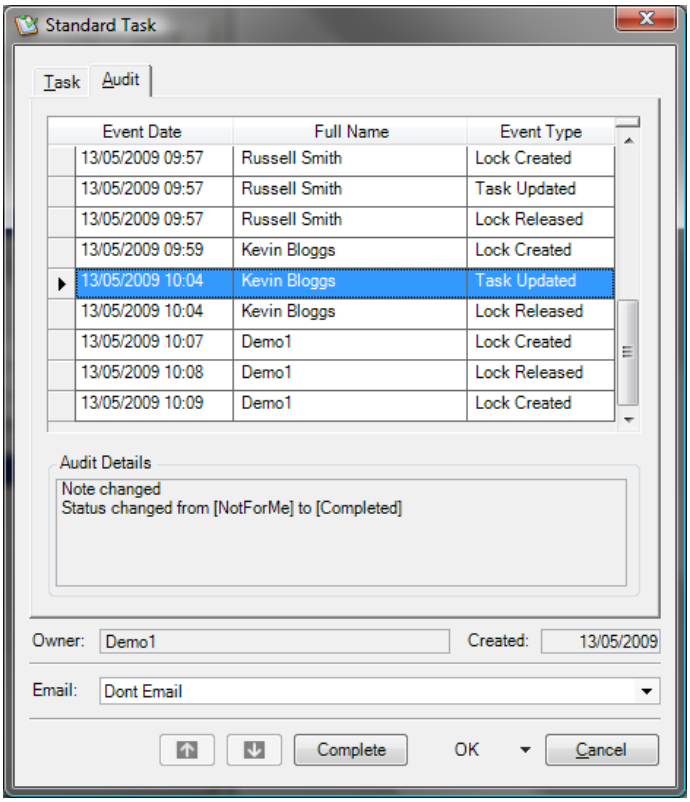

Figure 216

14 Lists

14.1 What's In This Chapter?

With Lists you can,

- Use pre-made lists to select search or indexing criteria
- Maintain a list through list maintenance
- Update lists on the fly while using them

This chapter will explain,

- How to Identify Lists
- How to Access List Maintenance
- How to Maintain Lists with List Maintenance

- Adding New Items
- Editing Existing Items
- Deleting Items
- Importing / Exporting Lists
- Testing Lists
- Maintaining Lists In-Situ

14.2 How to Identify Lists

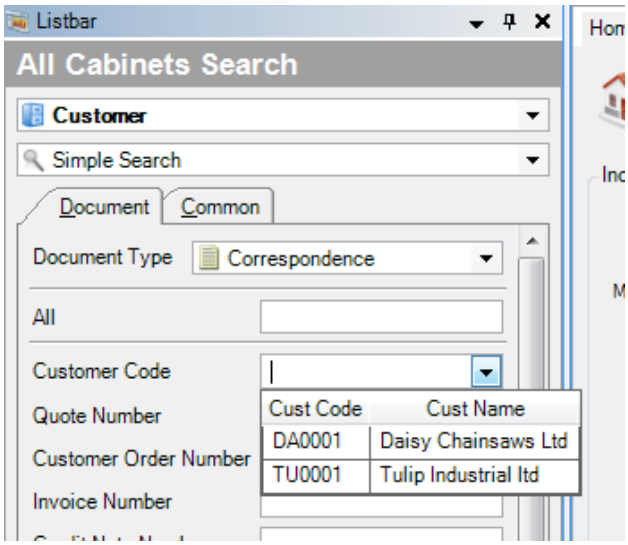

Figure 217

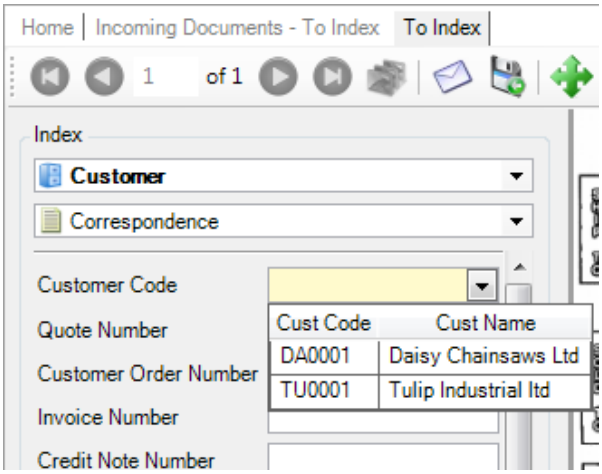

Figure 218

When you are entering references for searching (Figure 217) or indexing (Figure 218) you may see drop down boxes which link to lists within mstore. These lists can be maintained through List Maintenance if you are either an administrator or a user with the **Can Access** module permission. For administrators see the List Maintenance Guide.

14.3 How to Access List Maintenance

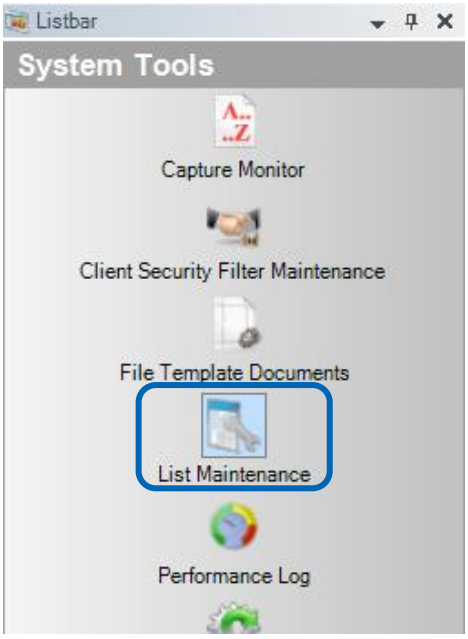

Figure 219

To access List Maintenance you first need to find the List Maintenance button in the ListBar (Figure 219). Clicking on this will display the List Maintenance Form in a new tab with all the lists you have permission to maintain displayed.

If you cannot find the List Maintenance button contact your system administrator to either give you the relevant permissions or to place the button on your ListBar.

14.4 How to Maintain Lists with List Maintenance

Once the list maintenance tool opens it should look something like the screenshot shown in Figure 220. In the bottom-left of the window are the familiar Add, Edit, and Delete buttons for performing standard list maintenance functions. On the bottom-right there are buttons allowing you to apply security permissions to your list, or to test the list to see how it functions.

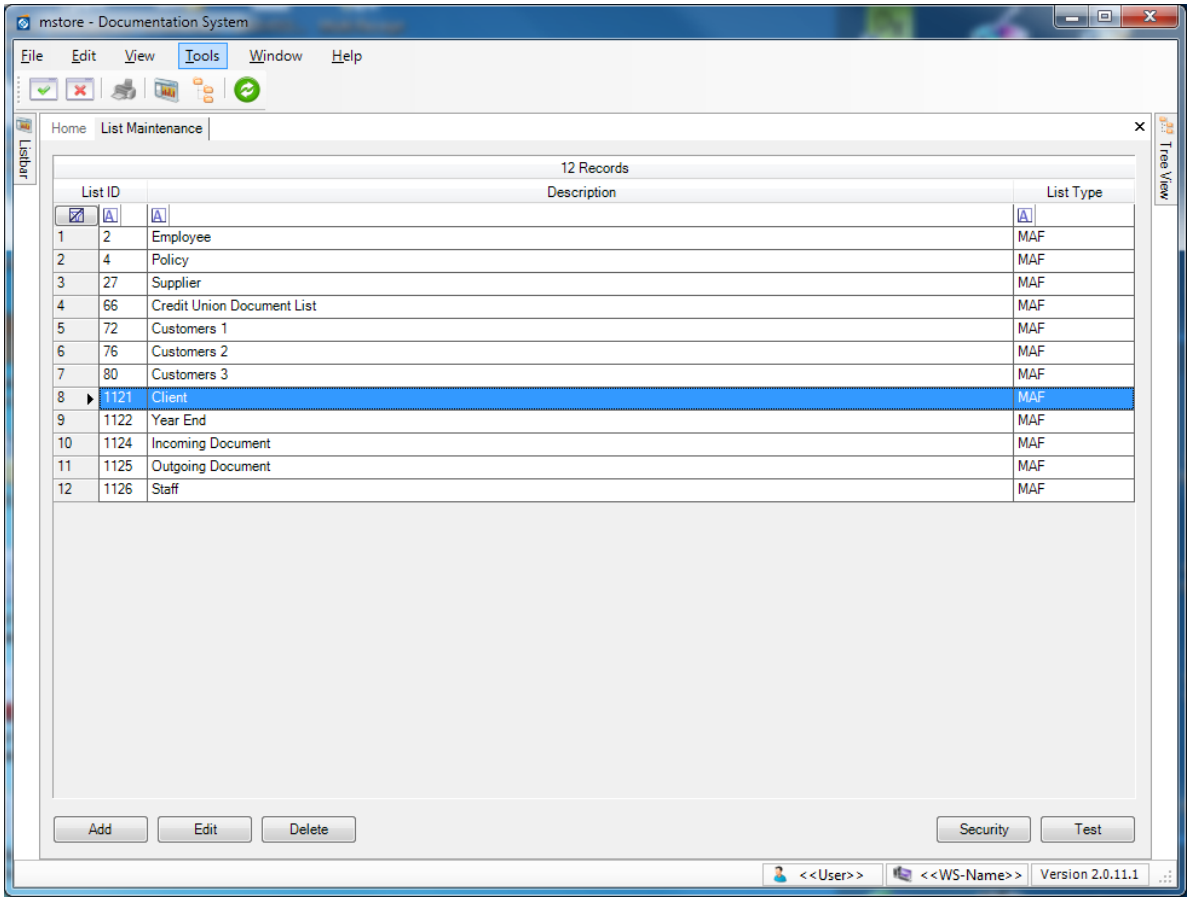

Figure 220

The first step is to find the list that you want to maintain. For this example we will use the **Client** list which you can see selected in Figure 220. To amend this list, select it in the grid and then click the **Edit** button. This will display the list configuration dialog for your selected list (see Figure 221).

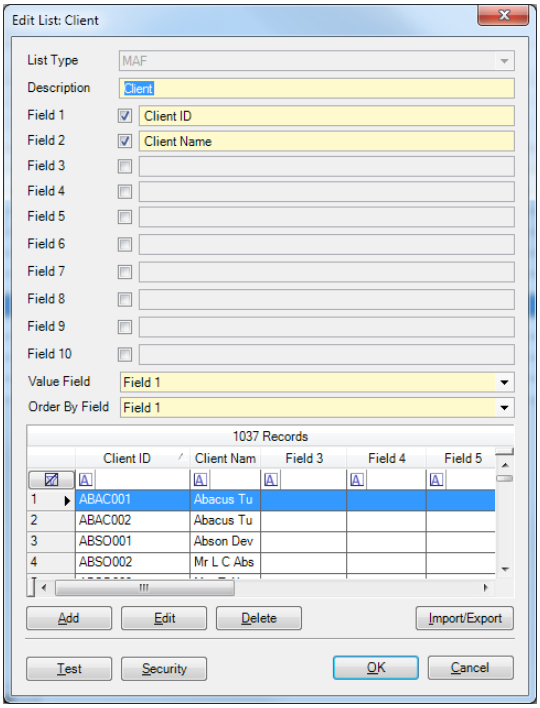

Figure 221

From the screenshot we can see that this list has two data fields (or columns) configured; **Client ID** and **Client Name**. Although mstore supports up to 10 columns per list, you don't have to use all of these. The checkboxes before the field name show which fields are 'active' and which aren't currently being used.

The grid in the lower portion of the window shows the list item values that have been entered for this particular list. When the list is run, these are the items that will appear within it.

14.5 Adding New Items

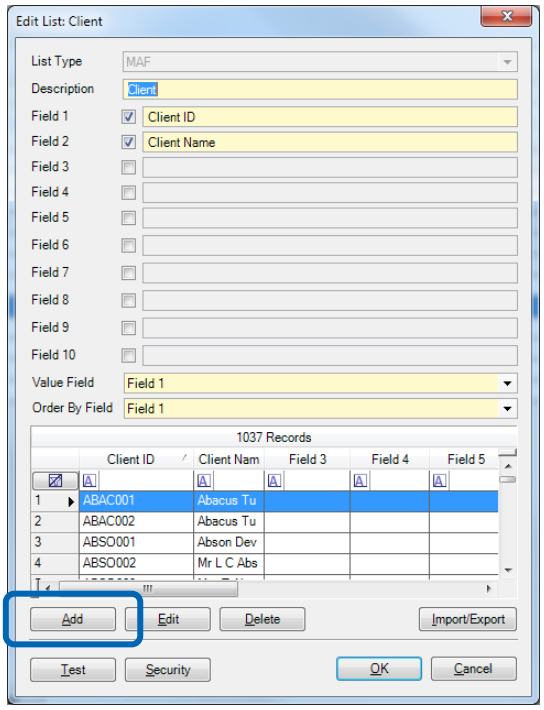

Figure 222

To create a new row in the list, click the **Add** button (Figure 222).

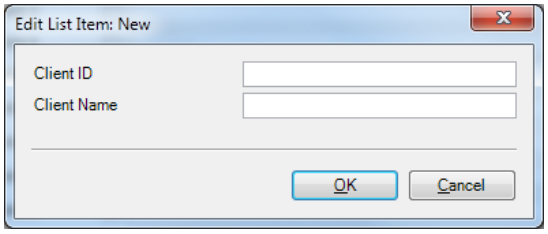

Figure 223

Enter in the values and click **OK** to add the values to the list; the dialog will stay open allowing you to quickly enter multiple list items. Click **Cancel** to close the form without adding the currently entered information (Figure 223).

14.6 Editing Existing Items

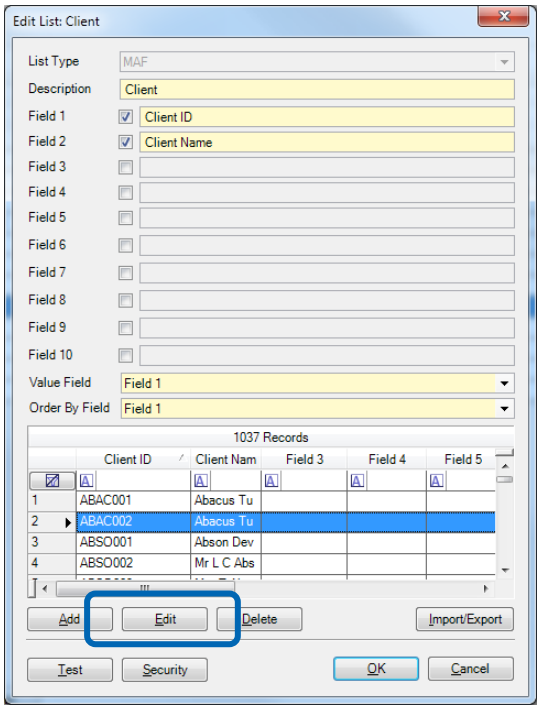

Figure 224

To edit a row, select it in the grid and click **Edit** (Figure 224).

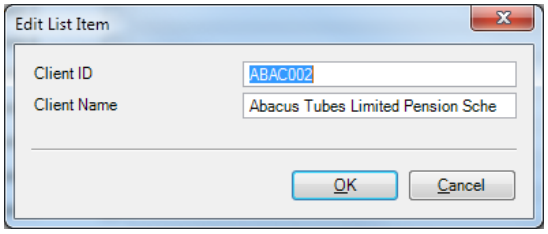

Figure 225

After amending the details click **OK** to add the values to the list or **Cancel** to undo the changes (Figure 225).

14.7 Deleting Items

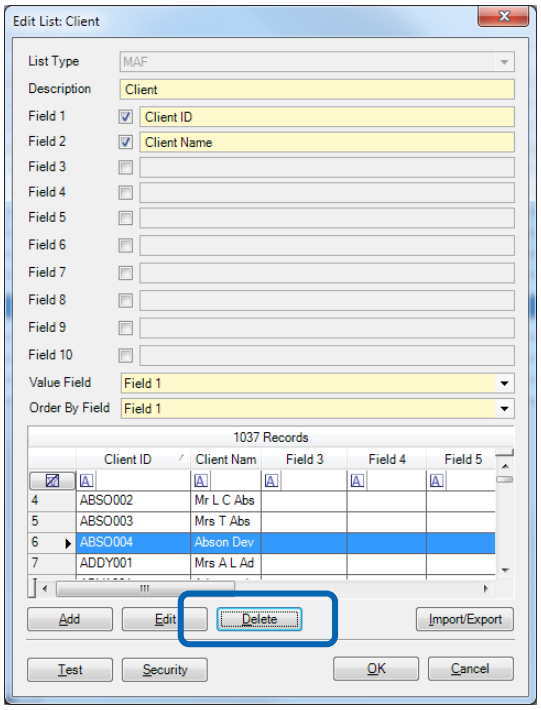

Figure 226

To delete a rows select one or more[3] in the grid and click **Delete** (Figure 224).

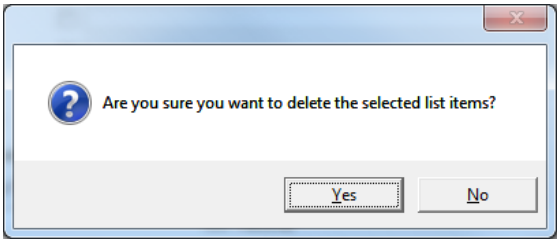

Figure 227

You will be prompted to confirm if you would like to delete the row (Figure 227), if you click **Yes** then the row will be removed from the list.

[3] To select a range of list items hold shift and click on another row, this will select all the list items between the list item you were on and the list item you selected. You can also use the control key to individually select multiple list items.

14.8 Importing / Exporting Lists

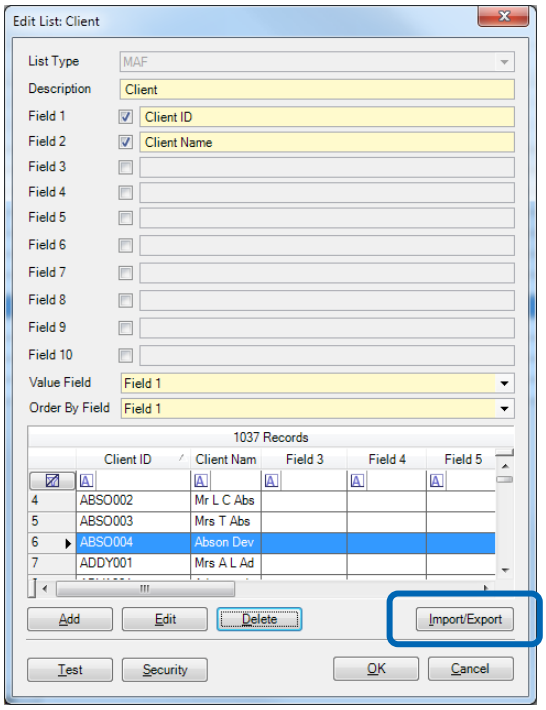

Figure 228

Clicking Import/Export (Figure 228) will show the CSV Import/Export dialog allowing you to import or export a list in CSV format (Figure 229).

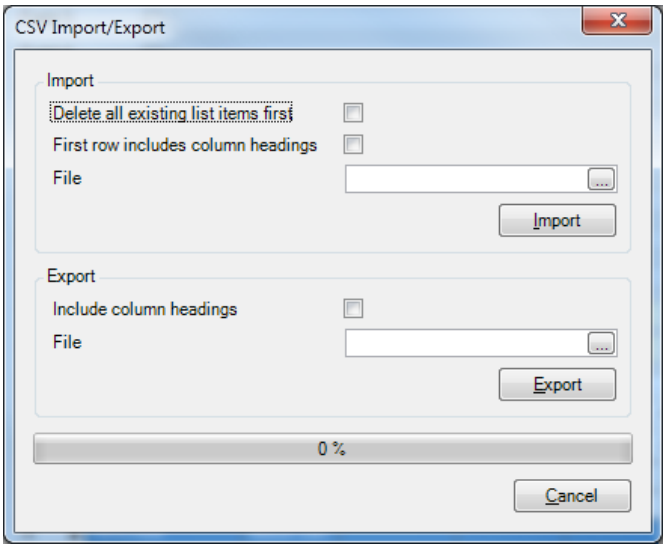

Figure 229

14.9 Testing Lists

In the list maintenance program, you can test a list to see what items it is returning. The test can be performed from one of two different locations. The first location is from the main list maintenance dialog.

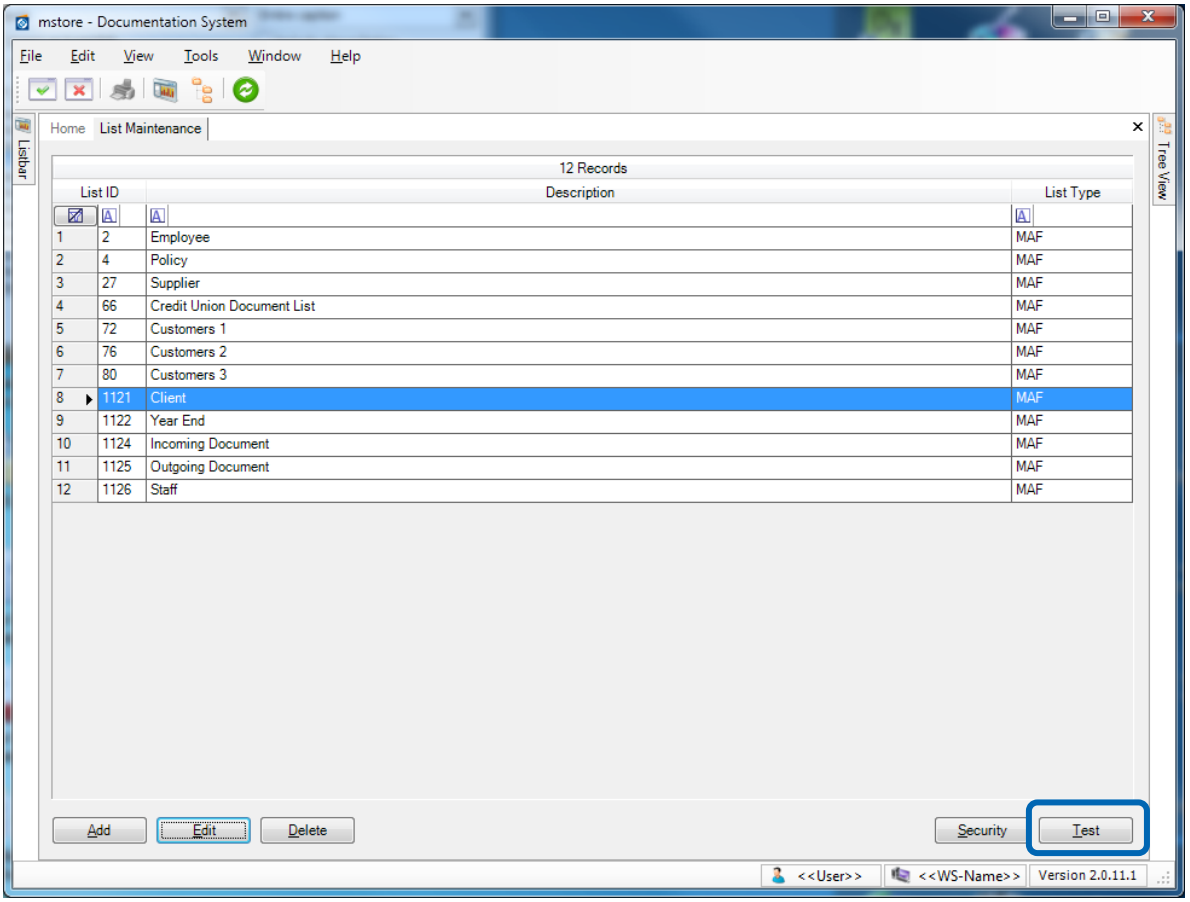

Figure 230

If you are currently amending a list, you can also access the test facility from the list modification dialog.

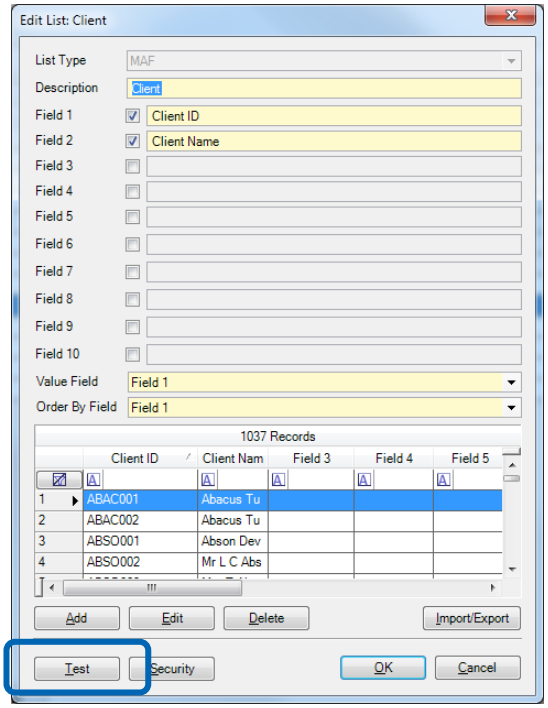

Figure 231

In both instances when the **Test** button is clicked, you will be presented with the Data Test Results dialog below (Figure 232).

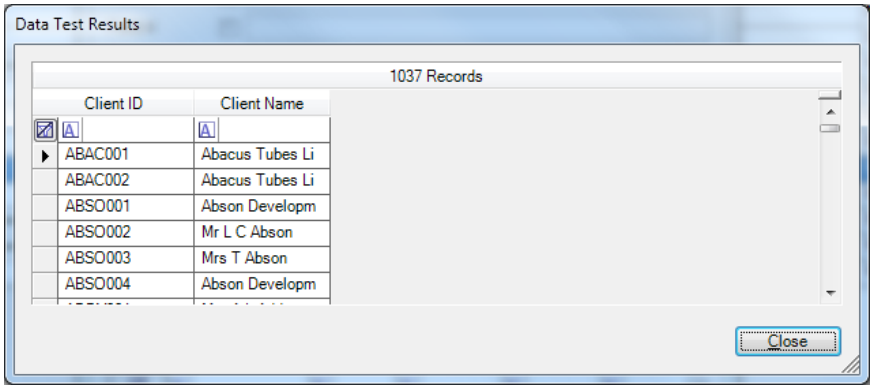

Figure 232

14.10 Maintaining Lists In-Situ

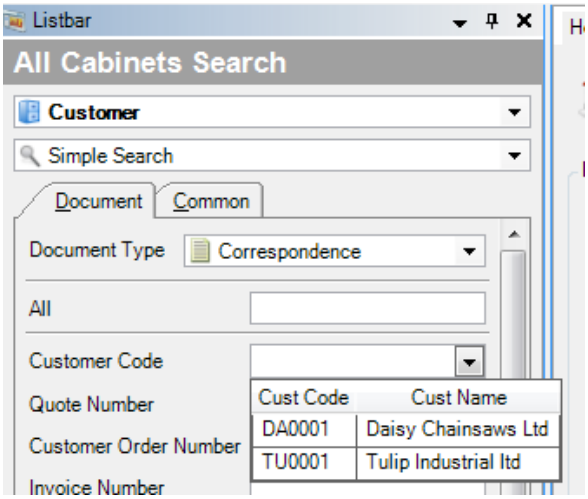

Figure 233

If you have permission to maintain a list you can edit the list while using it in mstore without the need to enter List Maintenance (Figure 233).

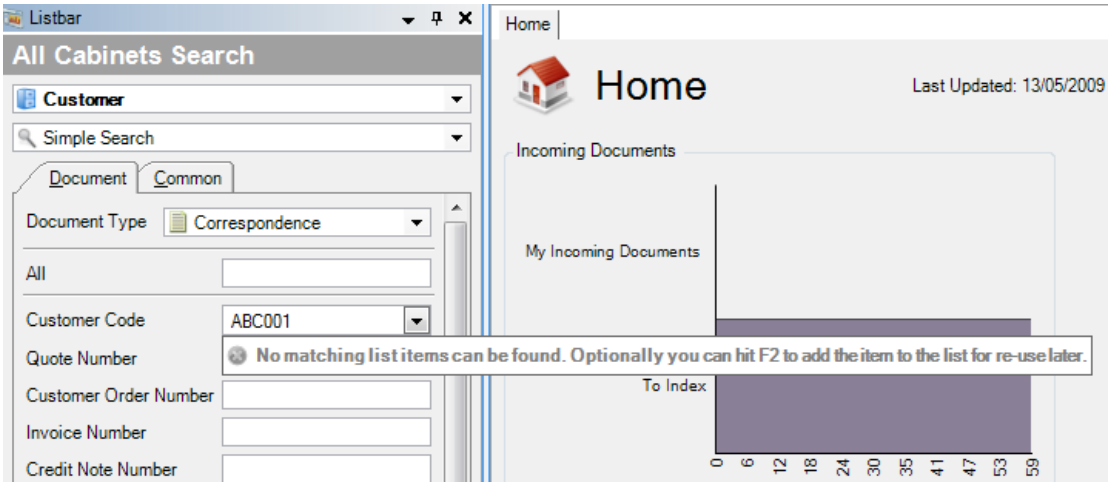

Figure 234

If you enter a value that isn't in the list you will be told that by leaving the control you can add the item to the list (Figure 234). Press **F2** to popup a new dialog with the value you entered placed in the fields (Figure 235).

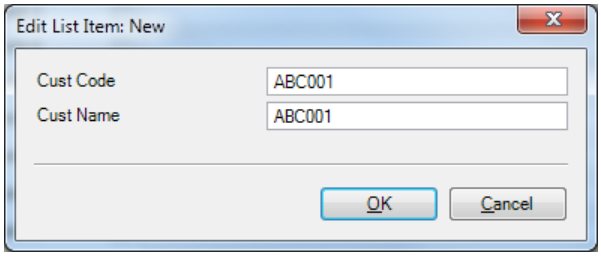

Figure 235

You must alter the details first so that the values for all the fields are not the same (Figure 236).

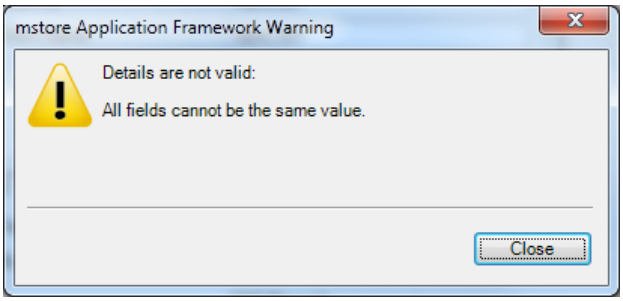

Figure 236

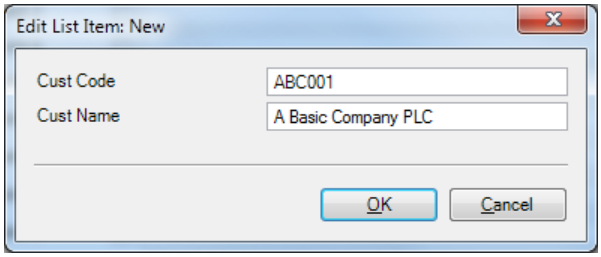

Figure 237

Click **OK** to confirm the new list item (Figure 237) and you will see the item you have just entered in the field (Figure 238).

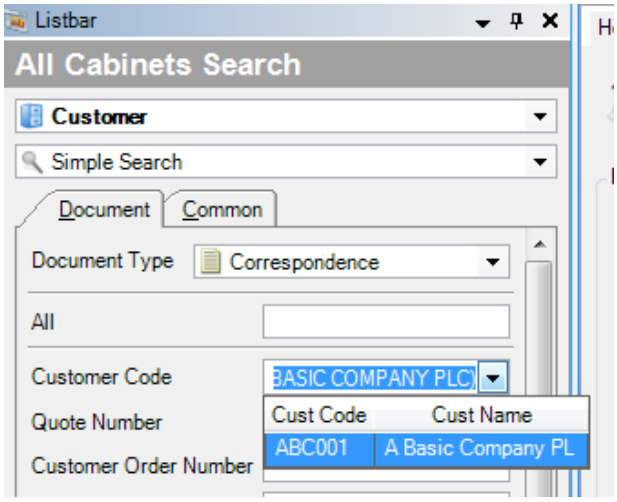
Listbar
All Cabinets Search
Customer
Simple Search
Document
Common
Document Type
Correspondence
All
Customer Code
BASIC COMPANY PLC
Quote Number
Customer Order Number
Cust Code
Cust Name
ABC001
A Basic Company PL

Figure 238

15 Barcode Indexing

15.1 What's in this chapter?

With Barcode Indexing you can,

- Scan documents for barcodes
- Use the barcode to split documents into batches
- Use the barcode as a reference

This chapter will explain,

- Barcode Indexing
- Indexing when barcodes are used as a separator sheet

15.2 Barcode Indexing

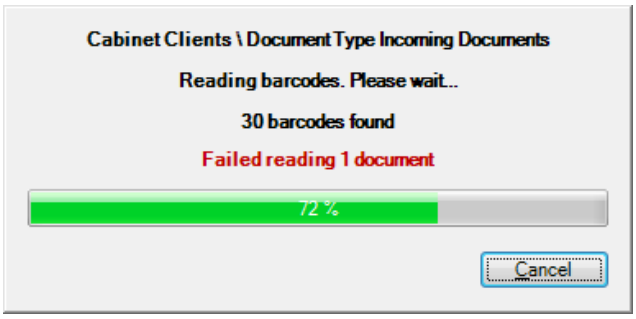

Figure 239

Barcode indexing occurs when indexing from incoming documents, when you change cabinet or document type and a document type with barcode indexing is selected mstore will begin scanning the batch (Figure 239).

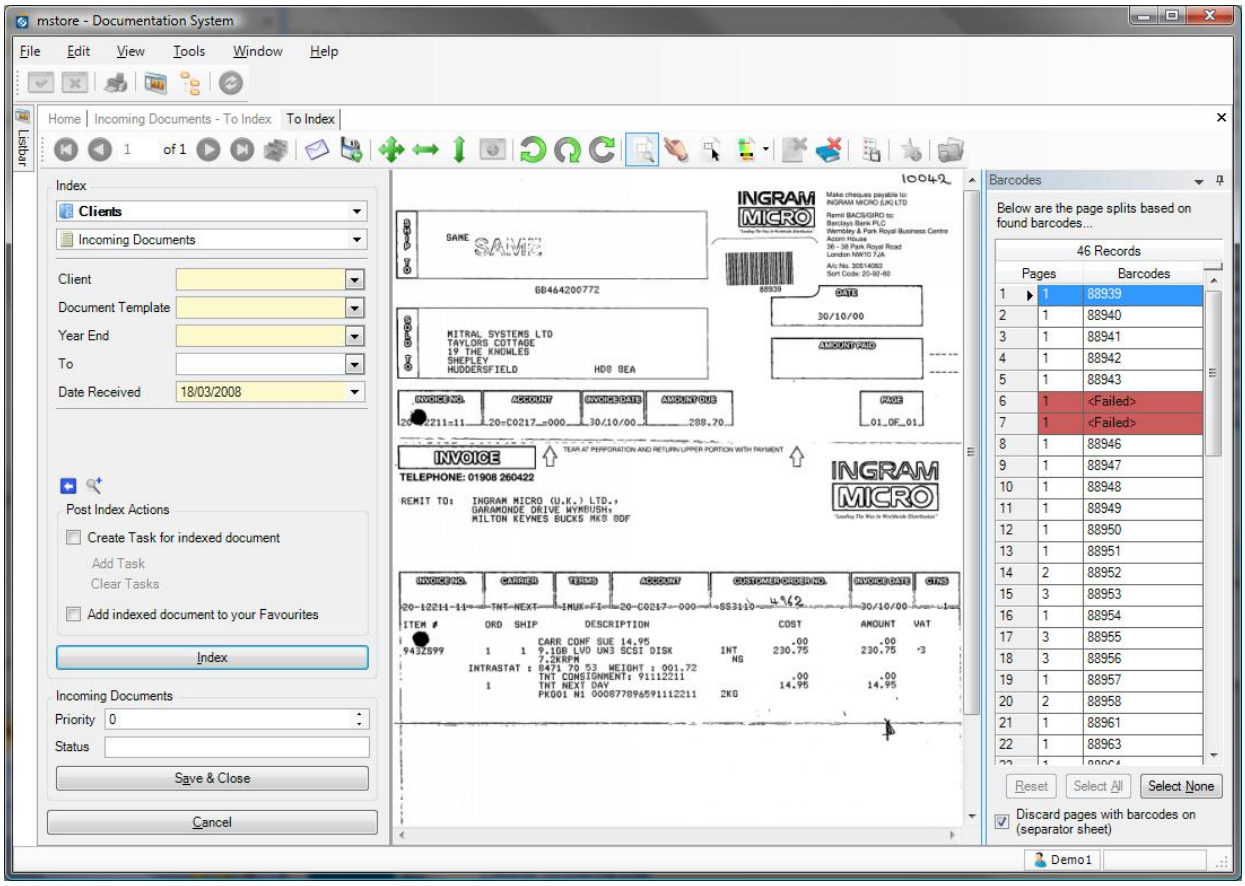

Figure 240

The interface for barcode indexing changes and a new Barcodes section can be seen on the right hand side.

The grid contains all of the documents that will be indexed (this is based on the type of barcode reading). You can un-tick the Index field if you don't want to index that document, invalid documents will be highlighted red.

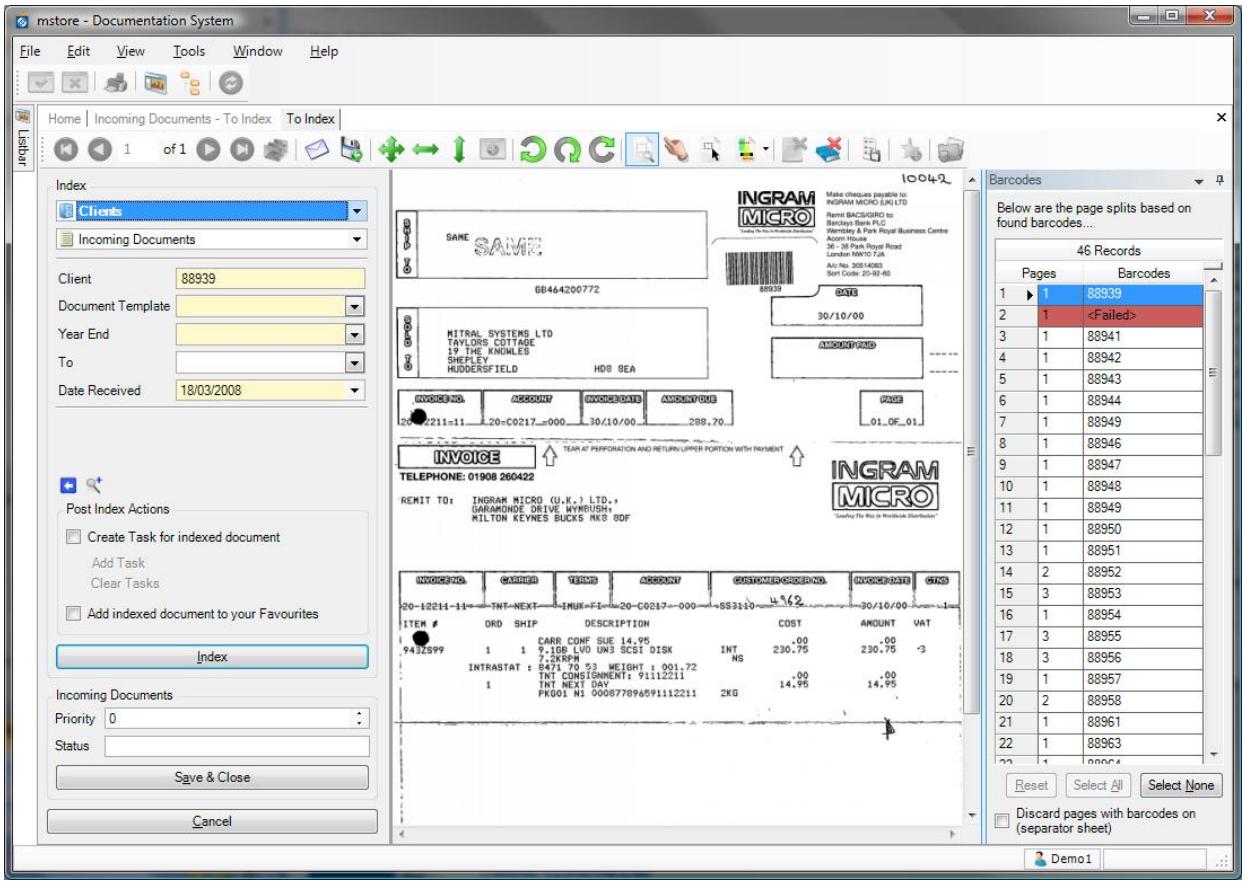

Figure 241

When there are additional references visible you don't get the index field because each page split has to be indexed manually, the barcode reference however has been automatically populated; in the example Client field contains the reference (Figure 241).

If there are no other visible references then you will see the index field, this can be used to select which documents to index when the user clicks on the **Index** button. This will then automatically index all of the ticked page splits (Figure 240).

Setting	Description
Reset	Sets the index field back to what is was after the barcodes were read.
Index All	Sets all of the index fields to ticked unless the item is red.
Index None	Unticks all items and asks the user if they want to batch index.

Discard Pages With Barcodes On (separator sheet)	Deletes the first page of each page split unless there is only one page in the document (this will cause an error).

15.3 Indexing when barcodes are used as a separator sheet

When barcodes are used as a separator sheet indexing documents is the same process except rather than selecting the pages from the batch you just work down the list in the grid that has been generated.

16 Appendix

16.1 What's in this chapter?

This chapter of the manual contains information about various elements of mstore which could not easily be classified under the existing areas. It contains useful information about logging into mstore, and other important elements such as reporting errors.

This chapter will work through,

- Saved logins and logging out
  - When logins are saved
  - Logging out
- Options
  - Default Display Settings
- Reporting Errors
  - Reporting Errors when an error has occurred
  - Reporting Errors through the toolbar
  - Reporting an Error
- Unreleased Locks

16.2 Saved logins and logging out

16.2.1 When logins are saved

There are 2 ways to save login details.

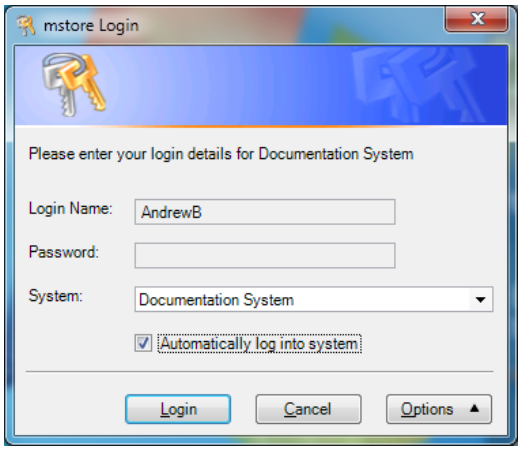

Figure 242

The first is by ticking '**Automatically log into system**' when you login (This only works when the user doesn't have a password) (Figure 242). When the option is clicked the **Login Name** and **Password** boxes will become disabled as an indication as to who you will be logging into the system as.

It should be noted that when the automatic login option is selected, the mstore Tray application will also log in automatically.

The second method of automatically logging into the system is to store your login details within the mstore Tray preferences dialog as in Figure 243. Once this is done the main mstore application will automatically log in provided that mstore Tray is running at the same time.

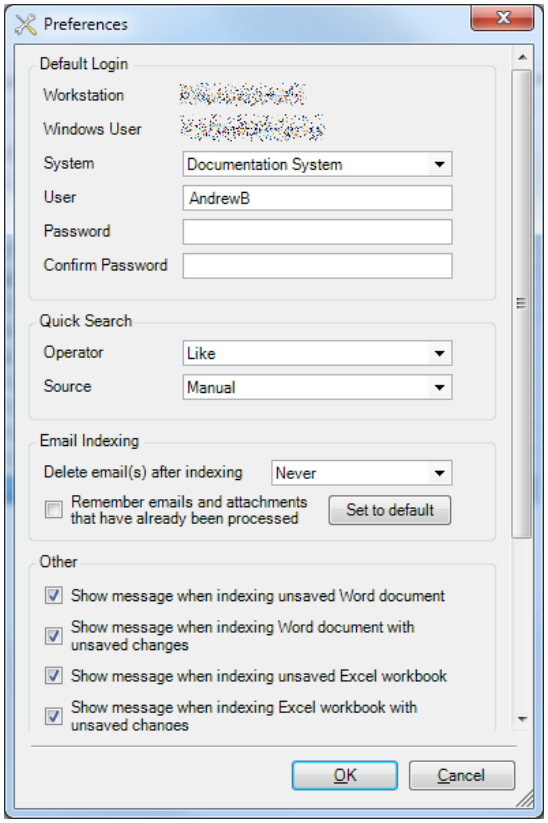

Figure 243

The second is by storing your default login within mstore Tray; after logging into mstore Tray, mstore will use these login details to login to mstore.

16.2.2 Logging out

To clear these saved logins and login as a different user you will need to go to File → Logout and Exit (Figure 244); exiting using File → Exit or by closing the window does not clear the saved login information.

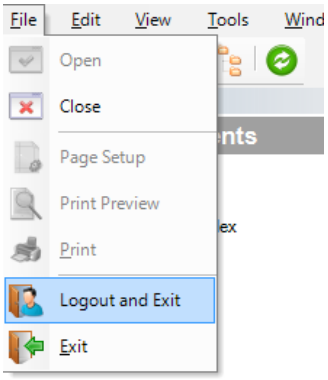

Figure 244

16.3 Options

The options within mstore can be found in Tools → Options → ...

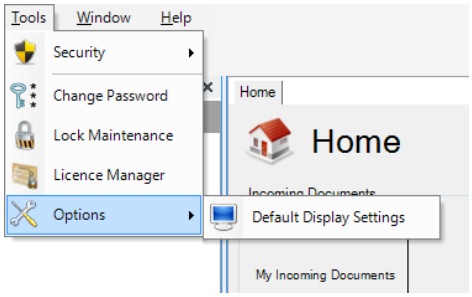

Figure 245

16.3.1 Default Display Settings

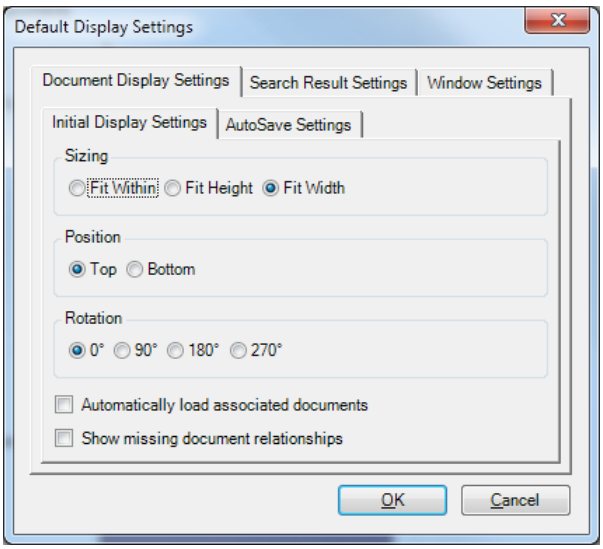

Figure 246

Sizing is the default sizing method for documents that have no preferences.

Position is which section of the document will be will be scrolled to if the document is larger than the viewer.

Rotation is the default rotation for documents that have no preferences.

Automatically load associated documents means that a document that cannot be displayed within the in-situ viewer will be popped up in its associated program. If un-ticked you will have to click on “Display Document” first.

Show missing document relationships decides if in Related Documents a related document type link without any relating documents is still displayed.

The ‘AutoSave Settings’ tab allows you to configure how the settings for each document are saved.

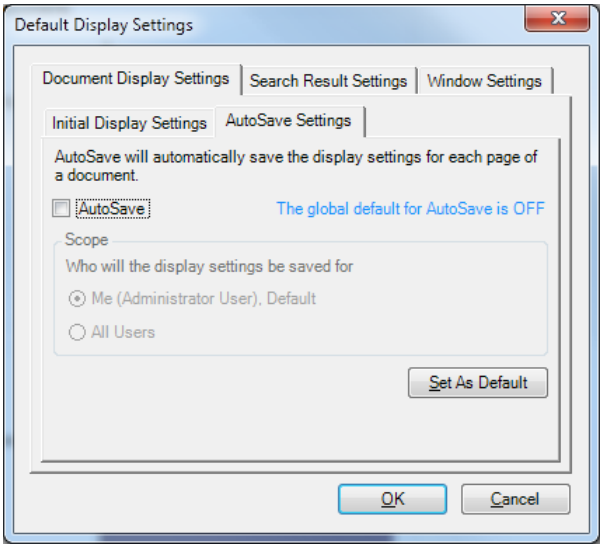

Figure 247

By default the AutoSave function is switched off, so no autosave processes will be carried out. When enabled there are two options for how the autosave functionality will work.

Me (<*Username*>), Default will only save the document view settings for the account which you are currently using (shown in the brackets). All other users will be unaffected by changes that you make.

All Users will result in any changes being applied directly to the document, so that all users will inherit the change. If for example, you changed the orientation of a document by 90°, whenever any user opened this document the same rotation would be applied.

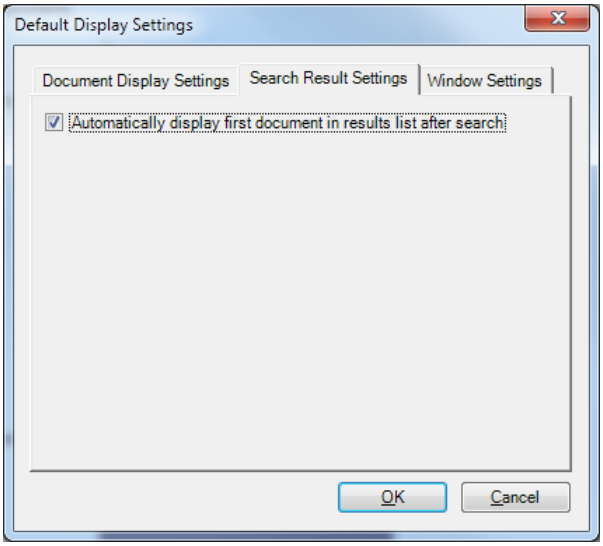

Figure 248

Automatically display first document in results list after search decides if after a search has been performed the top document will be displayed in the viewer without you selecting it in the grid.

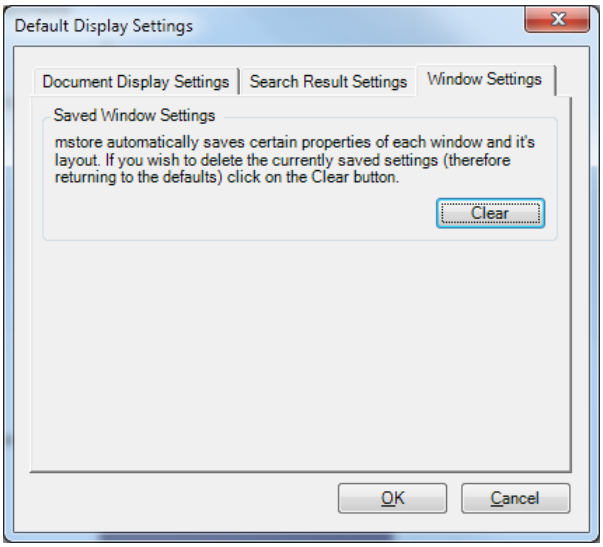
Default Display Settings
Document Display Settings
Search Result Settings
Window Settings
Saved Window Settings
mstore automatically saves certain properties of each window and it's layout. If you wish to delete the currently saved settings (therefore returning to the defaults) click on the Clear button.
Clear
OK
Cancel

Figure 249

Saved Window Settings allows you to reset the stored settings that 'remember' how your mstore screen is laid out. As you use the application mstore automatically stores the size and position of almost all the windows you will encounter. If you would like to clear these settings and return mstore to its default layout state, click the **Clear** button. Clearing the settings will reset the size and position of all client windows that may have been adjusted, and will also return the listbar and tree view panes back to their default sizes / positions.

When the window settings are loaded for a form mstore automatically re-adjusts the position to keep it within the screen.

16.4 Reporting Errors

16.4.1 Reporting Errors when an error has occurred

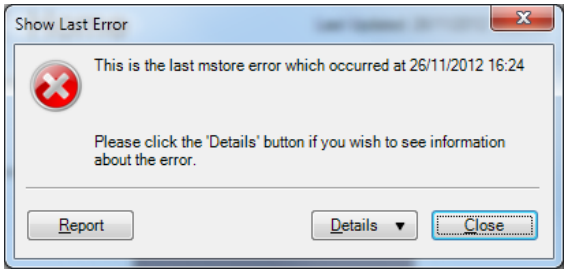
Show Last Error
This is the last mstore error which occurred at 26/11/2012 16:24
Please click the 'Details' button if you wish to see information about the error.
Report
Details
Close

Figure 250

When mstore experiences an unexpected error, it will display a standard error reporting window as in Figure 250. This window allows you to supply Arena EDM Support with the details of the error so that further investigation into the cause can take place.

A common practice when reporting an error is to take a screenshot of the error dialog, paste it into an email and then send this to the Arena support desk. Unfortunately this doesn't provide enough information to investigate the error so it is recommended that you follow the instructions in the rest of this chapter to report the error. If you attempt to perform a screenshot of the error, you will receive the following message.

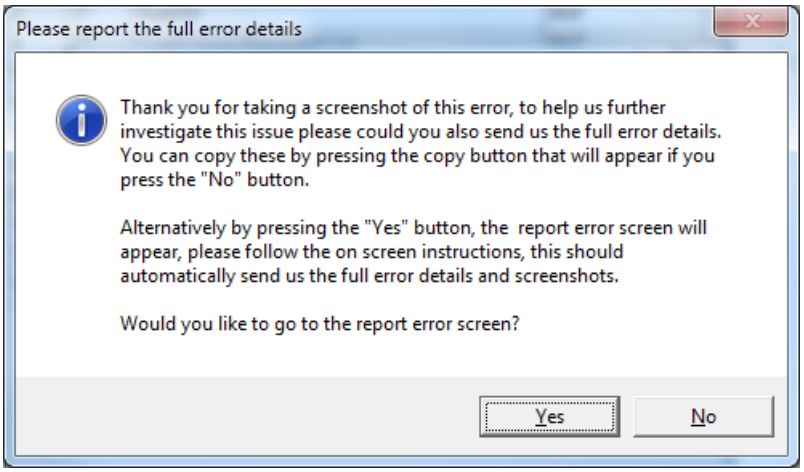
Please report the full error details
Thank you for taking a screenshot of this error, to help us further investigate this issue please could you also send us the full error details. You can copy these by pressing the copy button that will appear if you press the "No" button.
Alternatively by pressing the "Yes" button, the report error screen will appear, please follow the on screen instructions, this should automatically send us the full error details and screenshots.
Would you like to go to the report error screen?
Yes
No

Figure 251

If you click the **Yes** button you will be taken to the **Report Error** wizard, which makes it easier to collate all the necessary information for reporting errors to Arena EDM Support. (Figure 252). If you click the **No** button the original error reporting window will expand to reveal the full transcript of the error, along with a prompt asking you to copy the details of the error (Figure 253).

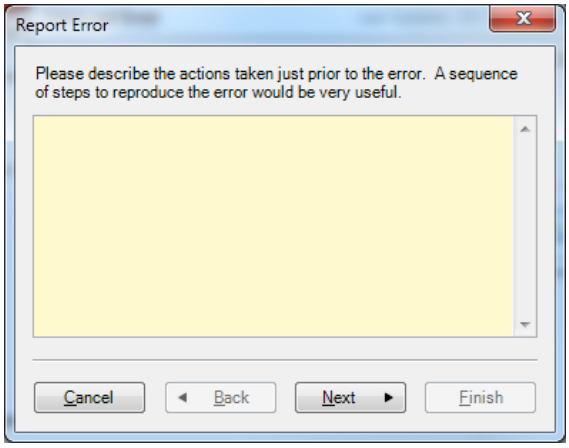
Report Error
Please describe the actions taken just prior to the error. A sequence of steps to reproduce the error would be very useful.
Cancel
Back
Next
Finish

Figure 252

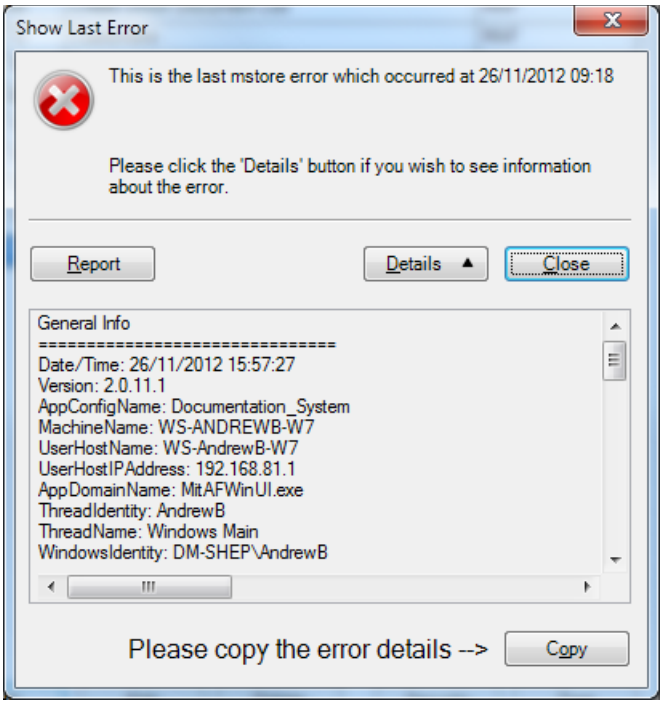

Figure 253

16.4.2 Reporting Errors through the toolbar

If the error happened and you cannot recover it through Show Last Error or it is a problem with the functionality you can open the Report Error window through the main toolbar. Go to Help → Report Problem... (Figure 254).

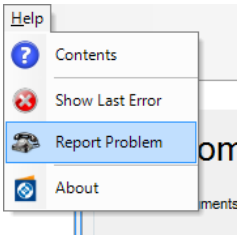

Figure 254

This will open up the Report Error window (Figure 255).

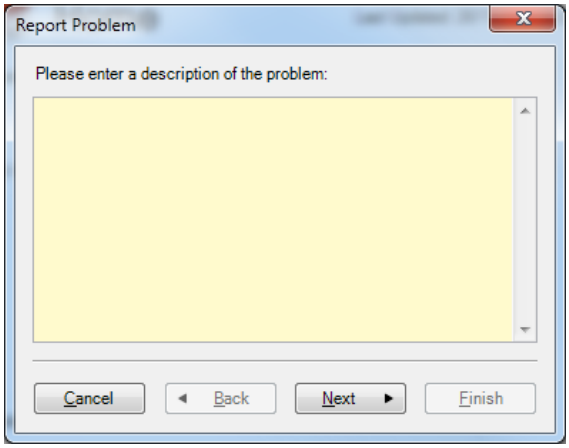

Figure 255

16.4.3 Reporting an Error

In the Report Error window you must first enter a description of the problem (**Error! Reference source not found.**). If a description is not entered and you click Next you will be presented with a warning (Figure 256).

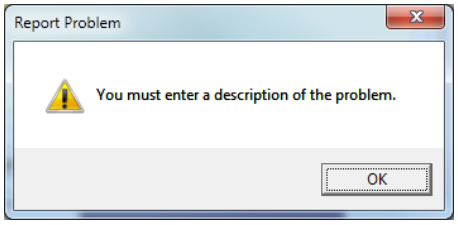

Figure 256

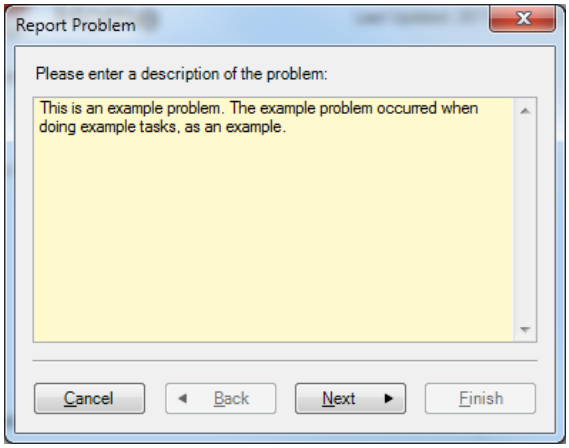
Report Problem
Please enter a description of the problem:
This is an example problem. The example problem occurred when doing example tasks, as an example.
Cancel
Back
Next
Finish

Figure 257

After entering a description click Next to see the next screen. In this screen you will be given options to describe the problem (**Error! Reference source not found.**).

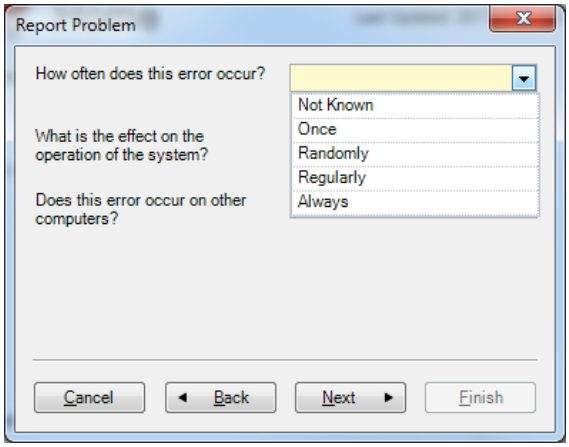

Figure 258

In the first drop down box select which option best describes how often the problem occurs (Figure 258). In general the options offered should be interpreted as follows.

Occurrence	Description
Not Known	For whatever reason it is impossible to say how often this problem occurs. It may be that you have gone to use another workstation and found the error on screen from a previous user.
Once	To the best of your knowledge the error has only happened once, but doesn't seem to have happened again since.
Randomly	The error has occurred more than once but there doesn't appear to be any pattern to the occurrences.
Regularly	The error happens frequently, but not necessarily every time you try to do a particular task.
Always	The error occurs every time you try to do something and may be preventing you from accomplishing a task.

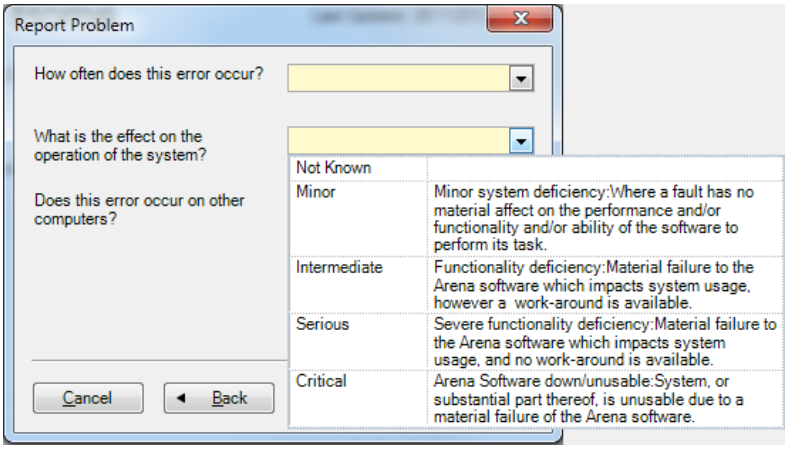
Report Problem
How often does this error occur?
What is the effect on the operation of the system?
Does this error occur on other computers?
Cancel
Back
Not Known
Minor
Minor system deficiency:Where a fault has no material affect on the performance and/or functionality and/or ability of the software to perform its task.
Intermediate
Functionality deficiency:Material failure to the Arena software which impacts system usage, however a work-around is available.
Serious
Severe functionality deficiency:Material failure to the Arena software which impacts system usage, and no work-around is available.
Critical
Arena Software down/unusable:System, or substantial part thereof, is unusable due to a material failure of the Arena software.

Figure 259

In the second drop down box select which option best describes how this affects the operation of mstore (Figure 259).

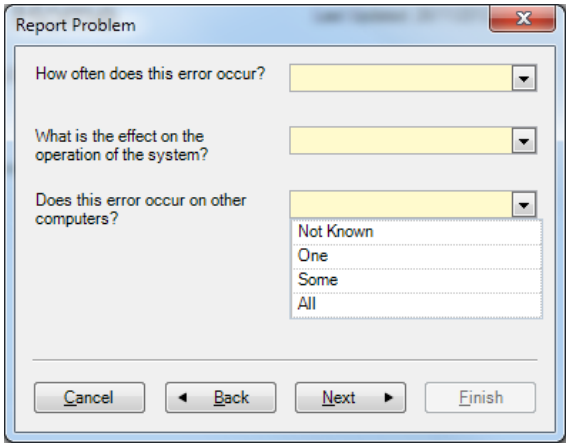

Figure 260

In the third and final drop down box select which option best describes how many computers this error occurs on (Figure 260).

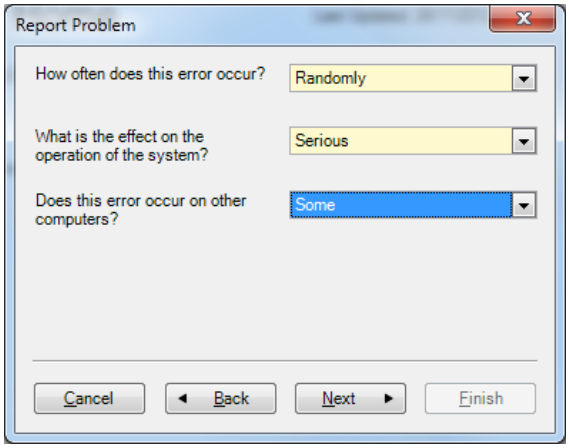

Figure 261

When you have filled in the details click 'Next' (Figure 261).

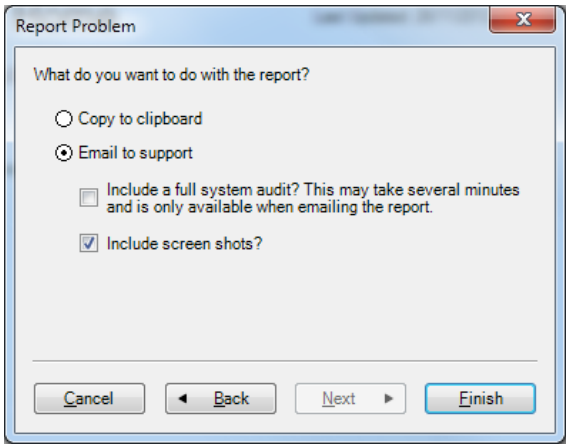
Report Problem
What do you want to do with the report?
Copy to clipboard
Email to support
Include a full system audit? This may take several minutes and is only available when emailing the report.
Include screen shots?
Cancel
Back
Next
Finish

Figure 262

After working through the wizard you will be presented with 2 options before you can finish (Figure 262):-

Setting	Description
Copy To Clipboard	When you click ‘Finish’, this setting will copy all the details of the error to the clipboard so that you can paste it into an email and forward it to Arena support.
Email To Support	If emailing is possible, this option will send an email to Arena Support with all of the details when you click finish.
Include a full system audit?	Selecting this will send Arena more information and could help in identifying the problem. It could however take several minutes to complete.
Include Screenshots	This option will allow screenshots to be appended to the error report, making problems even easier to identify.

16.5 Unreleased Locks

If mstore closes unexpectedly you may see a warning prompting you to release unreleased locks (Figure 263). This most commonly occurs if you are re-indexing when mstore crashes.

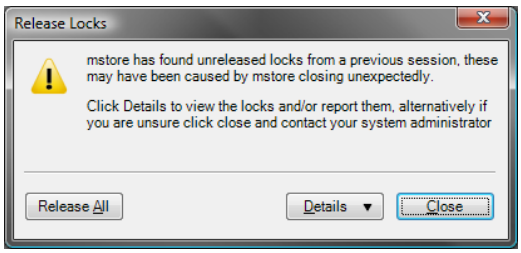
Release Locks
mstore has found unreleased locks from a previous session, these may have been caused by mstore closing unexpectedly.
Click Details to view the locks and/or report them, alternatively if you are unsure click close and contact your system administrator
Release All
Details
Close

Figure 263

You will be given the option to view the details of the locks; this will show you all the locks that mstore has found (Figure 264).

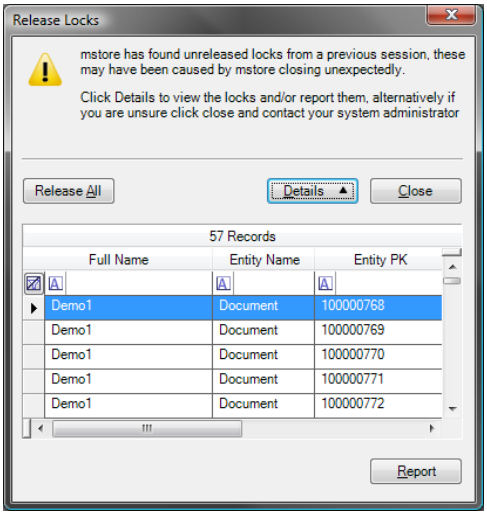
Release Locks
mstore has found unreleased locks from a previous session, these may have been caused by mstore closing unexpectedly.
Click Details to view the locks and/or report them, alternatively if you are unsure click close and contact your system administrator
Release All
Details
Close
57 Records
Full Name
Entity Name
Entity PK
Demo1 Document 100000768
Demo1 Document 100000769
Demo1 Document 100000770
Demo1 Document 100000771
Demo1 Document 100000772
Report

Figure 264

To release the locks click **Release All**, this is recommended because you will be locked out of whatever you were doing before mstore crashed.

If you are not sure then contact your system administrator and click '**Close**'.